



# Development Monitoring System Report

## Howard County, Maryland

Prepared by  
Howard County Department of Planning and Zoning

January 2005



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## DEPARTMENT OF PLANNING & ZONING

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*Marsha S. McLaughlin, Director*

January 28, 2005

A Message from the Planning Director:

I am pleased to present the annual Development Monitoring System Report. This is the thirteenth report issued since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. The report summarizes all development activity in the County from initial subdivision sketch plan phase to final use & occupancy permit. Both approved and in-process residential and nonresidential plans are discussed and categorized by location, type and intensity. Resulting population and employment impacts are then discussed. Comparisons to previous years' development activity are also included. In addition, there are sections on housing sales data, land preservation statistics and the status of APFO housing unit allocations. The intent is to summarize and discuss development activity in Howard County on a yearly basis in a single report. Highlights to the report are located on Page 2 of the Executive Summary.

Residential development is right in line with the General Plan 2000 projections with 1,522 completed housing units for the year. Of these units, less than half were single family detached houses, and a little over a quarter each were townhouse and apartment units (either rental or condo). This trend of more high density housing and less single family detached housing will continue based on available land and redevelopment activity, primarily in the Route 1 Corridor. Limited supply coupled with strong demand has continued to put pressure on housing prices, with the average sales price of all homes sold last year increasing by almost 17%, from \$296,000 to \$346,000. Last year, as part of the subdivision process, 412 acres were permanently preserved as agricultural and environmental easements in the Rural West.

The amount of non-residential building increased to more than 1.7 million square feet in issued building permits, up from a little over 1.5 million square feet the year before. The 1.7 million square feet in issued permits translates into close to 4,000 jobs, consistent with the annual job growth projections stated in the General Plan. Based on current planning activity non-residential growth will continue. There are about 2.9 million square feet in-process in site development plans, almost twice as much as the previous year when there were only 1.5 million square feet in process. Much of the current in-process space is for large manufacturing and warehouse/distribution buildings in the I-95 corridor. The County is clearly in the position for continued strong non-residential growth over the next several years.

Sincerely,  
Marsha S. McLaughlin  
Director

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# Development Monitoring System Report

**Date Issued:**

January 2005

**Reporting Period:**

October 1, 2003 to September 30, 2004  
With countywide summaries from October 1, 1999

**Produced by:**

Howard County Department of Planning and Zoning  
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# **Executive Summary**

## **Adequate Public Facilities Act**

The Adequate Public Facilities Act of 1992, expressed "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Section 16.1108 of the Adequate Public Facilities Act directs that "The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including number of residences or the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued."

This is the thirteenth annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits.

Both approved and currently in-process land development plans are tabulated. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 1999. More detailed information is reported for the most current year, October 1, 2003 to September 30, 2004. The report is divided into Residential and Nonresidential parts.

The section below discusses the highlights in this year's report. The following sections discuss the residential and nonresidential findings in more detail providing comparison charts by development stage. The second and third parts of this report, beginning on Pages 17 and 53, respectively, provide even more detail within each stage of development as well as further explanation on the land development process in Howard County.

## Highlights

### Residential Development

- Over the last five years, there has been an average of 1,850 new housing units built in the County each year. About 62% of these have been single family detached, 19% single family attached, and 19% apartment units (including both rental and condo).
- Last year there were 1,522 housing units built, right in line with the General Plan projections. Of these, 47% were for single family detached, 26% for single family attached and 27% for apartment units. It can be anticipated that the number of completions will remain at this annual level due to APFO restrictions. In addition, greater percentages of townhouse and apartment units are likely to persist.

- Last year, there was potential for 1,318 units from recorded lots, 1,960 units approved in site development plans and 2,190 building permits issued. This compares to five year annual averages of 1,099 units from recorded lots, 1,403 units in approved site development plans and 1,813 building permits issued.
- Last year about 25% of all units were built in Ellicott City, another 25% in the Southeast, 20% in Columbia and 19% in the Rural West. The remaining 11% were built in Elkridge.
- As of September 30, 2004 there were 7,345 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 6,819 units in process one year earlier (September 30, 2003).
- Almost two-thirds of the units in process are part of phased plans, with building planned for future years as far out as 2014. Some of the larger phased plans include Emerson and Maple Lawn in the Southeast and Turf Valley, Montjoy Farm and the Taylor properties in Ellicott City.
- Countywide, 41% of the units in process on September 30, 2004 were single family units. About 27% were single family attached units and another 32% were apartment units (including both condo and rental).

### Rural Land Preservation

- Last year, 412 acres of agricultural and environmentally sensitive land were permanently preserved. All of this preserved acreage is a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations. An additional 44 acres were preserved through the State preservation program.
- Since 1992, 9,823 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 7,028 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,795 acres, has been or is planned for development on 2,227 lots and 255 acres of roadway.

## Housing Sales

- The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$226,390 in 99/00 to \$345,720 last year for all housing types combined. This is an overall increase of 52.7 percent over the four year time period and an annual increase of about 11.2 percent. (See Page 46 for further details.)

## Non-Residential Development

- First quarter employment data provided by the State (the latest available), reports that there were 3,262 jobs created in Howard County. This is a welcome turnaround from the previous year when slight job losses were reported. It is also more jobs added than the year prior to last when only 2,621 jobs were added. As anticipated, as the effects of the recession have waned, moderate job growth in the County has resumed.
- Over the last 5 years, the State reports that 18,718 new jobs were created, an average of 3,744 jobs per year reflecting the strong local and regional economies over this time period. This average is slightly less than the General Plan projection of 4,000 jobs per year.
- Based on building space in last year's approved site development plans an estimated 2,418 jobs could be accommodated. About 3,977 potential jobs could be accommodated based on last year's issued building permits. This is an indication that nonresidential development is continuing and bodes well for confidence in a recovering economy.
- Last year about 1.5 million square feet of building space was approved in site development plans. Building permits were issued for about 1.7 million square feet. Over the last five years, the average annual amount was 2.4 million square feet in approved site development plans and 2.3 million square feet in issued building permits.
- Most of the new building space is located in the I-95 Corridor and Columbia. Comparably less space was planned in Ellicott City and a moderate amount in the West
- Last year, most of the overall development is for office/service space

(48% of total building permits), followed by government & institutional space (28%), manufacturing/extensive industrial space (14%), retail space (7%) and other (3%).

- As of September 30, 2004, there were 2.86 million square feet in-process in site development plans. This is significantly more than the 1.47 million square feet in process the previous year - almost twice as much. Of the total 2.86 million square feet in process this year, 1.80 million square feet (63%) is for manufacturing/extensive industrial space.

# Residential Development

## Development Activity

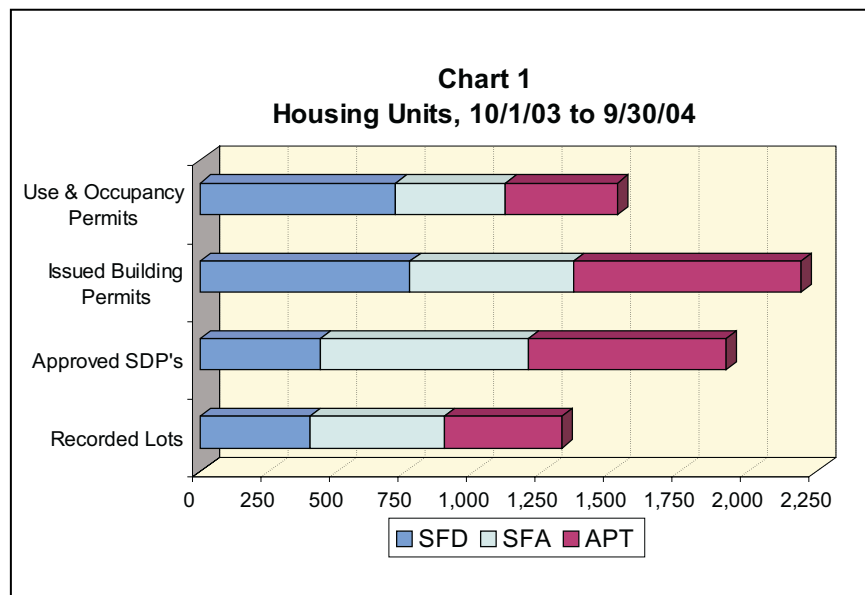
Chart 1 on the following page shows residential development activity from October 1, 2003 to September 30, 2004. Last year, a total of 1,522 use & occupancy permits and 2,191 building permits were issued. There were 1,960 units in approved SDP's and 1,318 potential units from recorded lots.

The following table shows the number of issued use and occupancy permits for each year starting in 1999. In 1999, there were almost 2,500 housing units constructed. The next two years each had about 1,900 completions. The following year, there was a decrease to only about 1,400 completions, about a 400 unit reduction. Last year's total at about 1,500 follows this reduced trend and is consistent with the General Plan projections and the associated housing unit allocation chart.

**Issued Use and Occupancy Permits by Unit Type, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	1,708	425	361	0	<b>2,494</b>
10/00 to 9/01	1,346	379	179	0	<b>1,904</b>
10/01 to 9/02	1,011	367	573	0	<b>1,951</b>
10/02 to 9/03	940	235	222	0	<b>1,397</b>
10/03 to 9/04	713	400	409	0	<b>1,522</b>
<b>TOTAL</b>	<b>5,718</b>	<b>1,806</b>	<b>1,744</b>	<b>0</b>	<b>9,268</b>
<b>PERCENT</b>	<b>62%</b>	<b>19%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVE.</b>	<b>1,144</b>	<b>361</b>	<b>349</b>	<b>0</b>	<b>1,854</b>

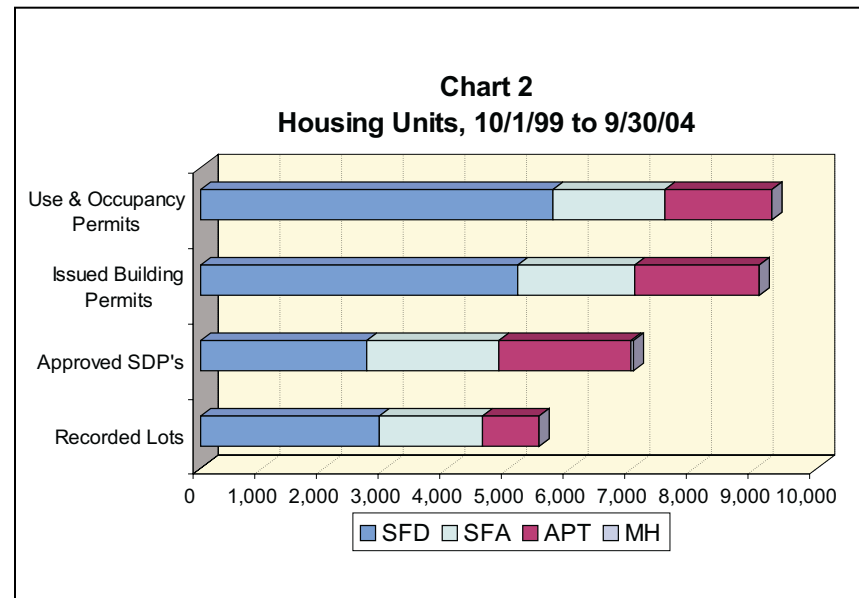




As indicated in Chart 2, for the five year growth period from October 1, 1999 to September 30, 2004, a total of 9,268 use & occupancy permits and 9,064 building permits were issued. This averages 1,854 use and occupancy permits and 1,813 building permits issued per year over the five year time period. Over the five years, there were a total of 7,017 units in approved SDP's and 5,494 units from recorded lots. This results in a five year average of 1,403 and 1,099 units per year, respectively.

It is important to note that residential development in the County typically begins with the subdivision process where new lots are recorded, followed by the site development plan (SDP) process, and then the issuance of building and use & occupancy permits. However, not all recorded lots must go through SDP phase and not all units reflected in SDP's are units that went through the subdivision process.

Prior to amendments to the Subdivision and Land Development Regulations, effective January 8, 2002, residential SDPs were required for all residential lots 20,000 square feet or less. The amended regulations now require site development plans for *all lots in the East*. Lots in the Rural



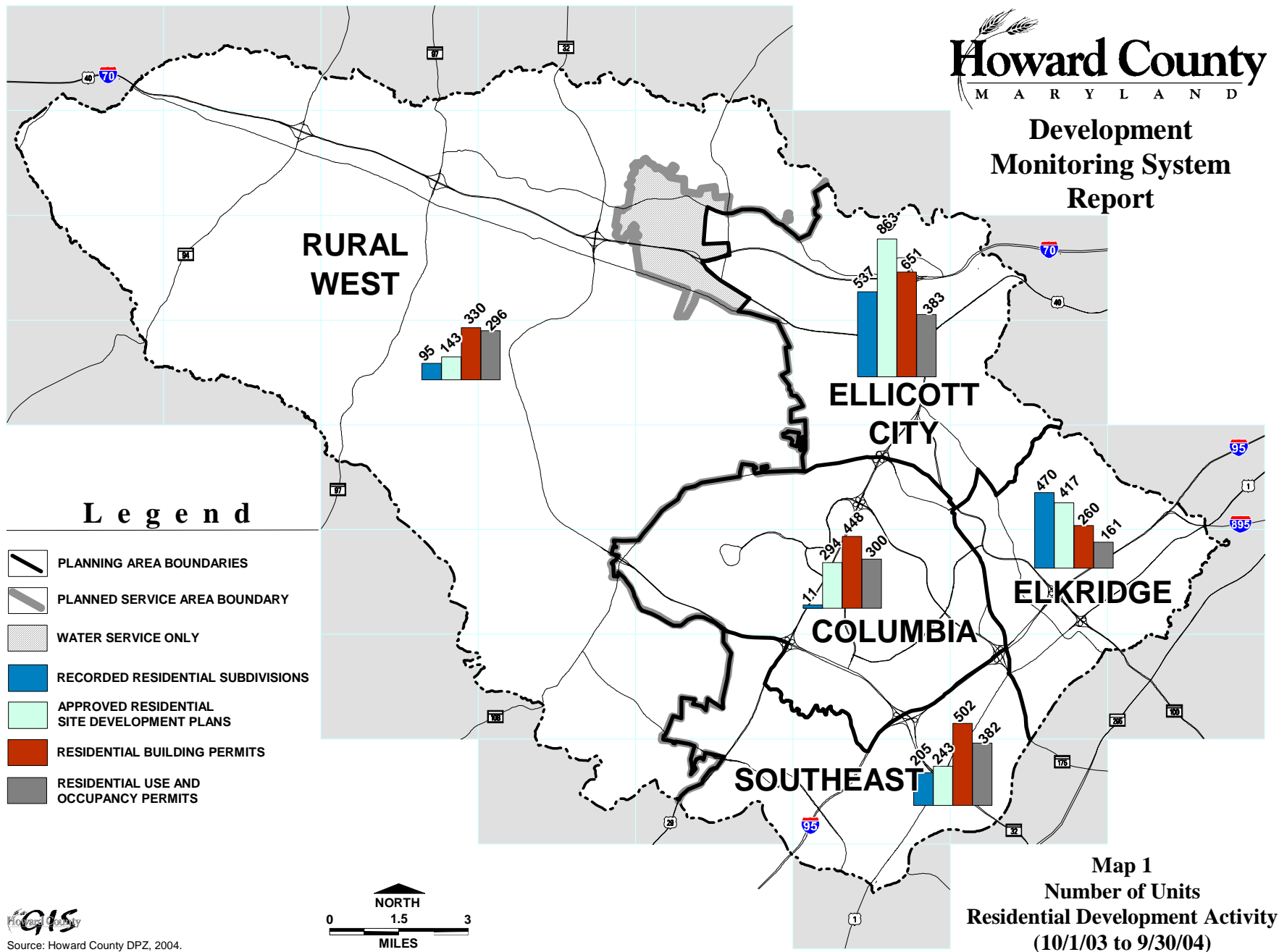
West are not required to have SDPs. Consequently, SDPs do not account for all residential growth in the County.

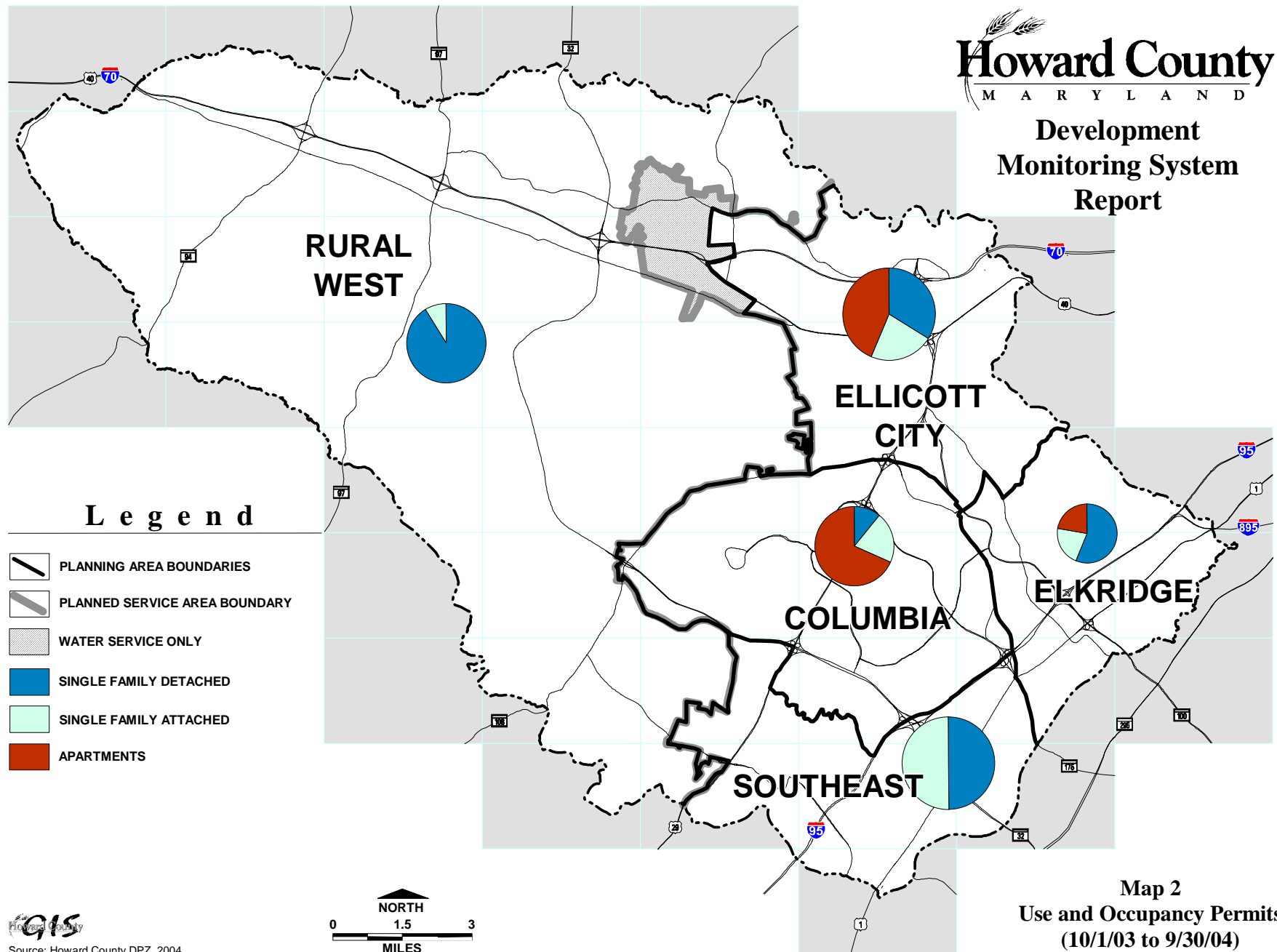
Also, not all units in SDP's, such as apartment buildings on bulk parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1999. Since all new housing units require building permits and ultimately use and occupancy permits, these measures more fully reflect actual development activity in the County. This also explains why the numbers of recorded lots and units in SDP's are less than the numbers of building and use & occupancy permits.

## Development Location

Map 1 shows the development activity last year for each development stage by planning area. Residential development activity is reported by five planning areas. These planning areas are consistent with General Plan projections and the Adequate Public Facilities Ordinance.

Note that there is also a senior unit set-aside area in the east that overlays the four eastern planning areas where 250 senior units can be built per year.





In addition, there is a Route 1 set-aside area that consists of the area of the County east of I-95 where another 250 units are allowed annually. These units are part of the Route 1 Revitalization effort and are required to be part of multi-use developments that include a commercial component. *Senior and Route 1 set-aside units are included in the tabulations of this report by planning area.* Beginning in next year's DMS, they will be shown as separate categories in order to track them as construction of these relatively new products get underway. For further discussion on these special set-aside categories refer to the Housing Unit Allocations section of this report beginning on Page 41.

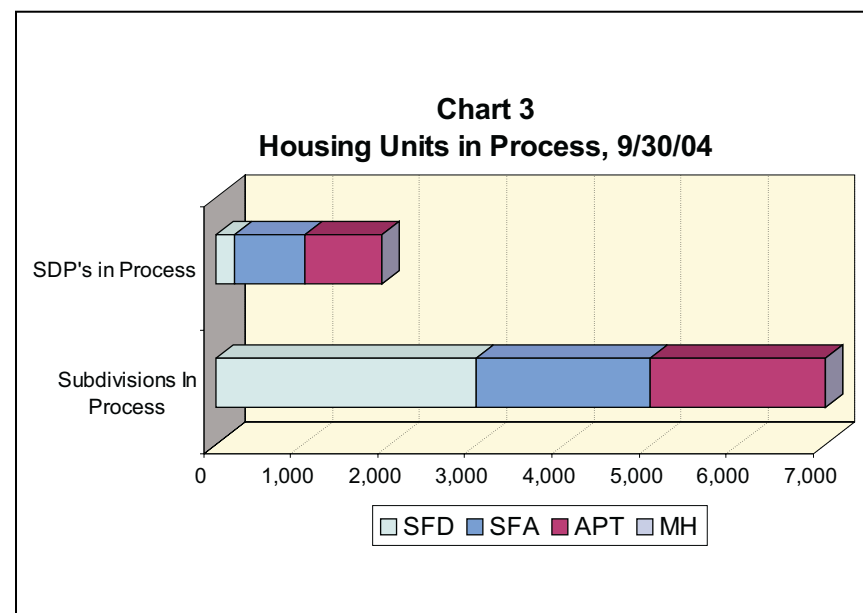
It is clear that much of the development activity has been concentrated in Ellicott City, and to a lesser extent, the Southeast and Elkridge. There has been comparably less activity in the Rural West and Columbia. Note that in Ellicott City and Elkridge, the number of newly recorded lots is relatively high which will result in more building and use & occupancy permits to come in the future. These primarily consist of Montjoy and the Taylor properties in Ellicott City and the Oaks at Water's Edge in Elkridge.

Map 2 shows the use & occupancy permits issued last year by unit type for each planning area. In addition to showing the unit type breakdown in each region, the size of the pie charts also reflect the relative number of issued permits.

The overall Countywide breakdown of issued use & occupancy permits last year was 47 percent single family detached, 26 percent single family attached and 27 percent apartment units. The map clearly shows how this varies by planning area with most of the permits for apartment units being issued in Columbia and Ellicott City. Most of the townhouses were built in Ellicott City, Columbia and the Southeast.

## Plans In Process

Chart 3 shows the number of potential housing units that are in the subdivision and site development plan process. These are units in subdivision plans that are not yet recorded and site development plans that are not yet approved. As of September 30, 2004, there were 7,345 units in the subdivision process and 1,911 units in the site development plan process. For

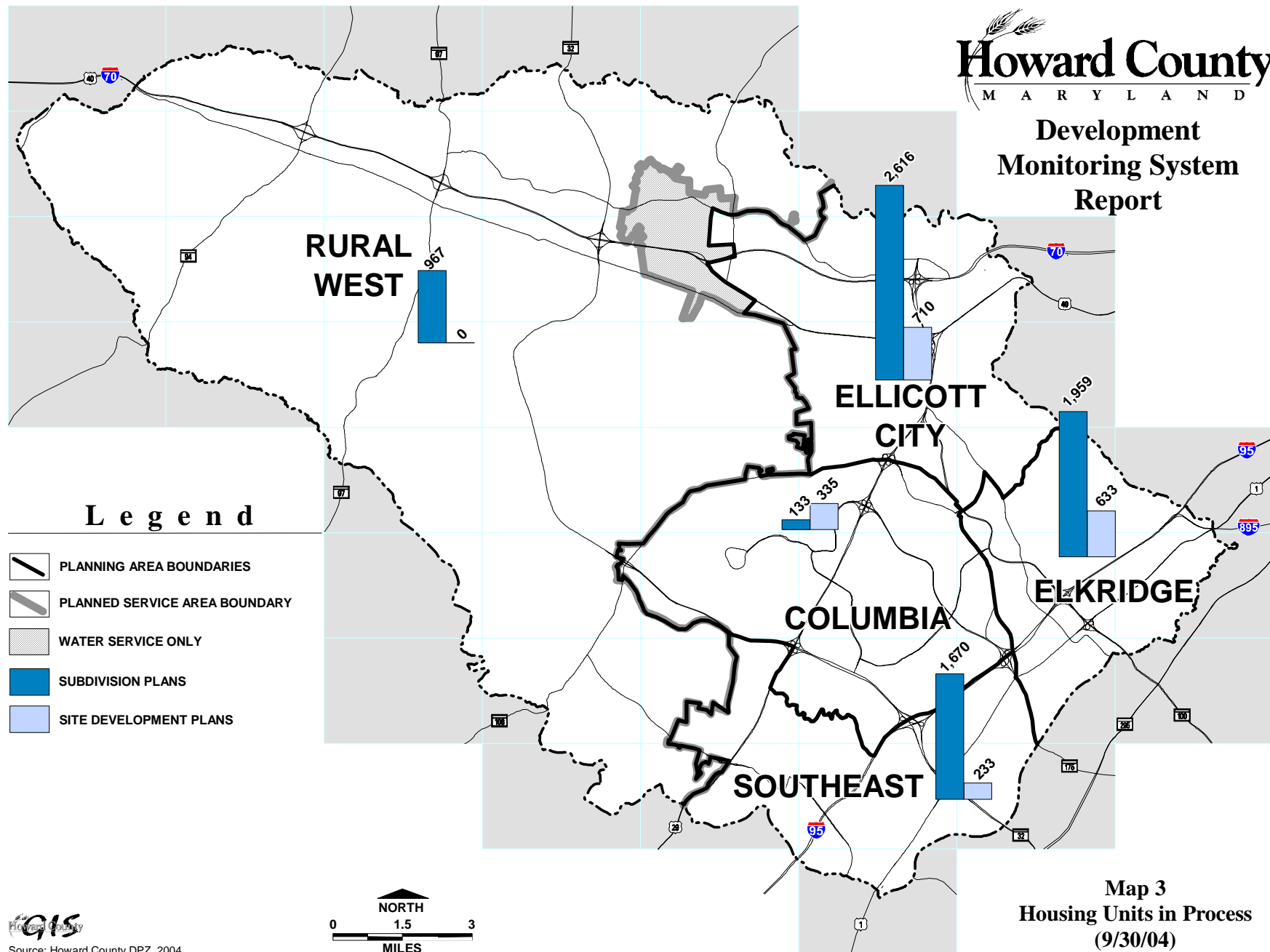


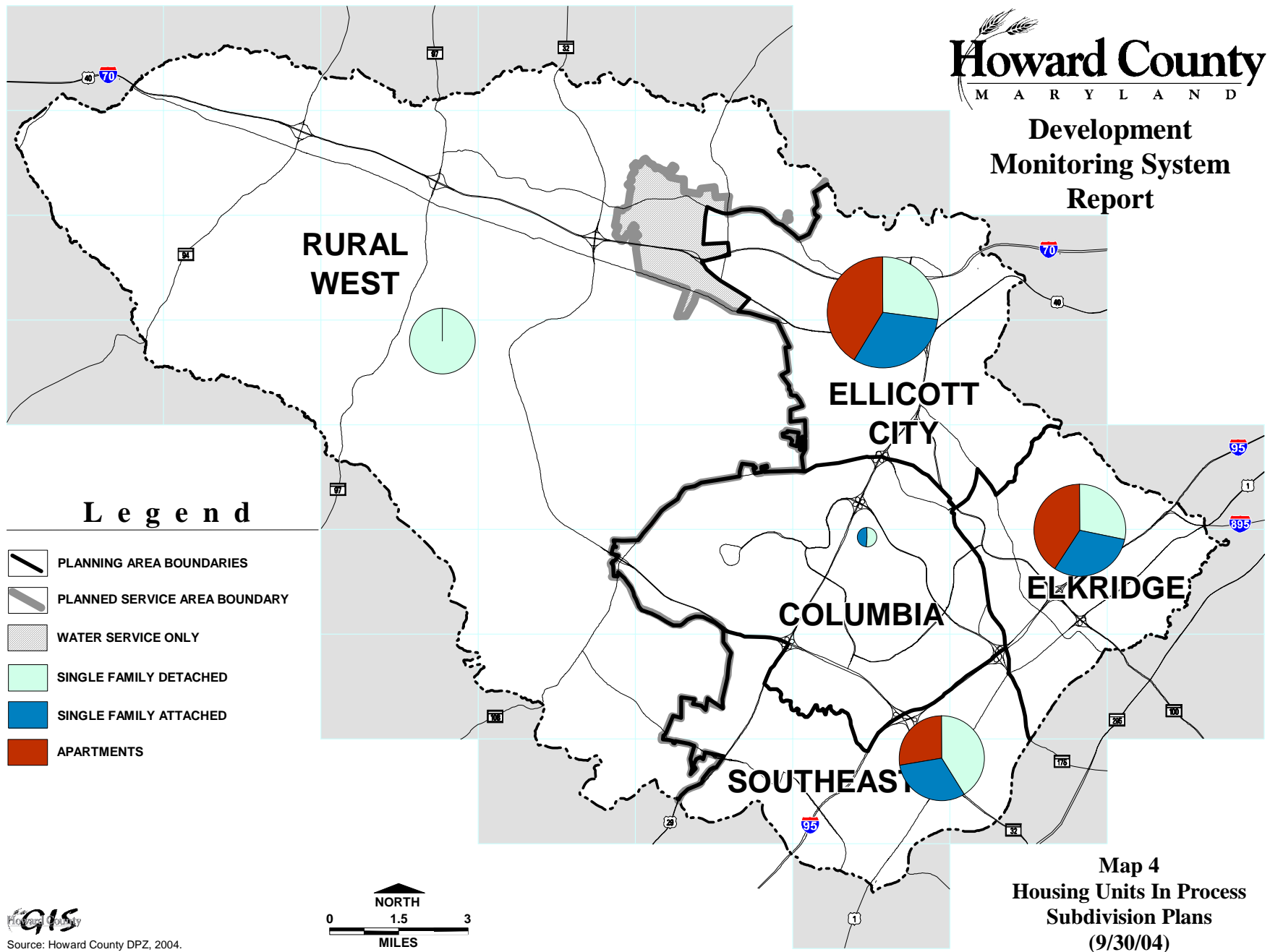
comparison purposes, for the previous year on September 30, 2003 there were 6,819 units in the subdivision process and 2,489 units in the site development plan process.

It is important to note that a significant number of the 7,345 potential units in the subdivision process are part of phased projects with building planned for future years. Of the total 7,345 units, 4,699 are part of phased plans, with building planned as far out as 2014 (in the case of Maple Lawn). This represents about 64 percent of all units in process. Most of the phased projects are in the Southeast and Ellicott City. The larger projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley and the Taylor properties in Ellicott City.

## Plans in Process by Location

Map 3 shows the in process plans distributed by location. Of the 7,345 potential units from subdivision plans in process, Ellicott City has the greatest number with 2,616, 36 percent of the total. This is followed by Elkridge with 1,959 units in process (27 percent). The Southeast has 1,670 units in process, followed by 967 in the Rural West and 133 in Columbia.





Of the 1,911 units in the site development plan process, 710 are in Ellicott City, 633 in ElkrIDGE, 335 and 233 in the Southeast. There are no units in the site development plan process in the Rural West.

Map 4 shows the number of units in the subdivision plan process by unit type for each planning area. On September 30, 2004 all planning areas had single family detached units in process. Most in process single family attached or townhouse units were in the Ellicott City, ElkrIDGE and the Southeast. These planning areas also had large numbers of apartment units in process. The Rural West only had single family units in process.

Countywide, 41 percent of the units in process on September 30, 2004 were single family detached units. About 27 percent were single family attached units and another 32 percent were apartment units.

## **Rural Land Preservation**

Last year, from October 1, 2003 to September 30, 2004, 201 acres of land were preserved and enrolled in Howard County's Agricultural Land Preservation Program. An additional 190 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels and 22 acres dedicated as a joint Howard County Conservancy/Howard County preservation parcel resulting in a total of 412 permanently preserved acres. All of this preserved acreage was a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations. An additional 44 acres were preserved through the State preservation program.

Since 1992, 9,823 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 7,028 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,795 acres, has been or is planned for development on 2,227 lots with 255 acres of roadway.

To date, there are about 19,277 acres of permanently preserved agricultural land in the Rural West and about 4,633 acres preserved as other easement types, for a total of 23,910 acres.

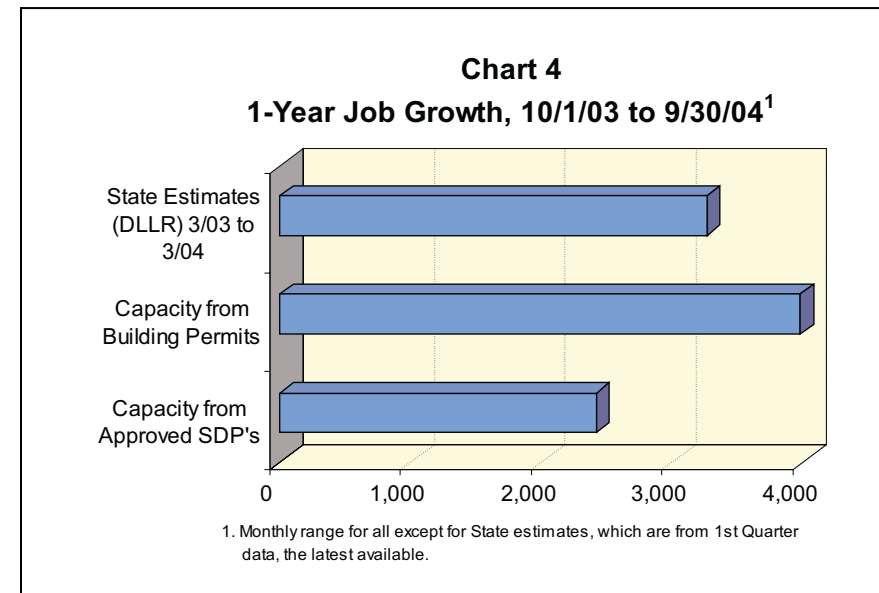
Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 34,661 acres, about 36 percent of all land in the Rural West.

# **Non-Residential Development**

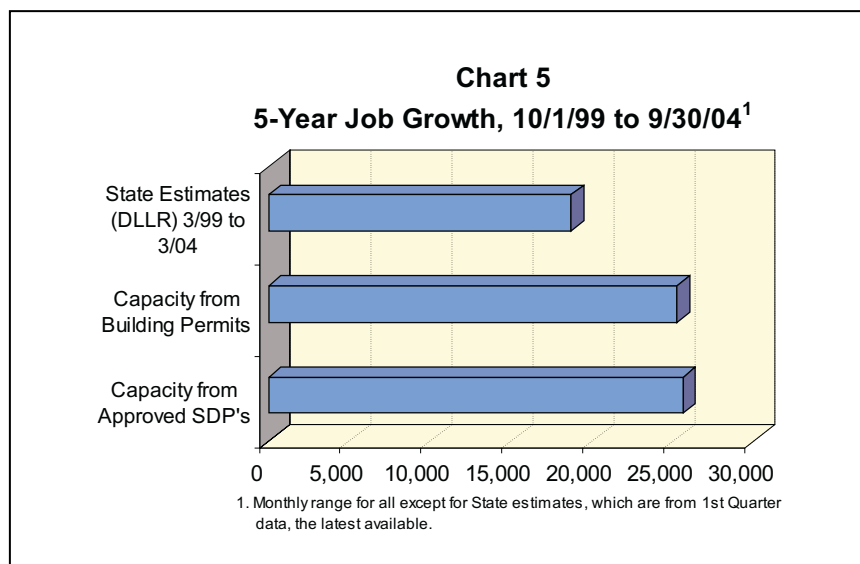
## **Job Growth**

Charts 4 and 5 show potential employment from approved site development plans and issued building permits compared to actual job growth based on estimates from the State Department of Labor, Licensing and Regulation (DLLR).

Potential employment growth from approved site development plans and building permits has been estimated based on information provided by the employer or as indicated on the plan. In some cases, calls were made to prospective employers. Where this information was not available a generalized ratio of employees to square footage was used. This ratio varies







depending upon the category of non-residential use (retail, office/service, manufacturing/extensive industrial and government/ institutional).

The one-year job growth estimates from the State from first quarter 2003 to first quarter 2004 indicates that there were 3,262 jobs added in Howard County. This compares to a slight job loss of 107 jobs the previous year and represents a recovering economy. Job growth as reported by the State over the last five years totals 18,718 new jobs. On average, this is a net gain of 3,744 new jobs per year. This average is slightly less than the General Plan projection of 4,000 jobs per year. Overall, the County fared well during the most recent recession that had occurred during this time period by experiencing relatively strong net job growth.

The *potential* jobs estimates from issued building permits and site development plans last year are 3,977 and 3,262 new jobs, respectively. If the new building capacity from this development activity continues to be utilized and vacancy rates remain stable, this is an indicator that the County is poised to experience continued job growth, at least over the short term.

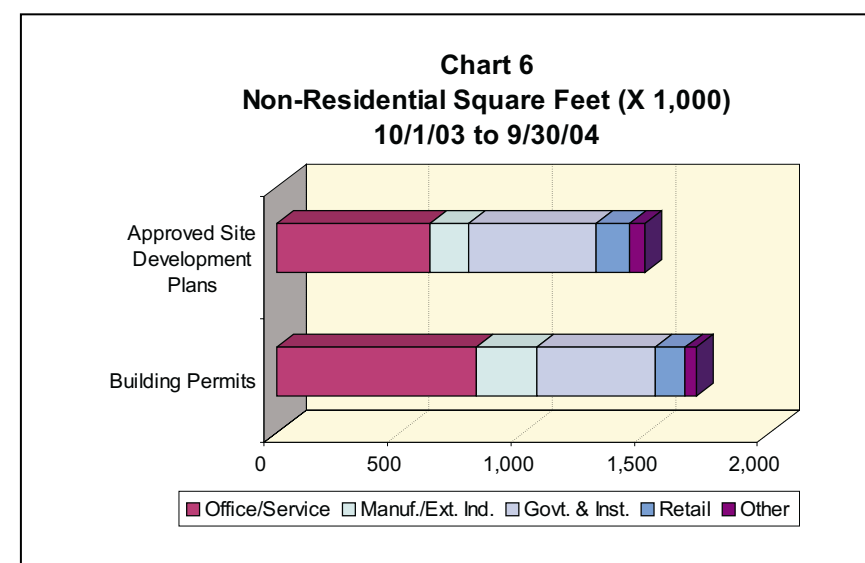
These current year job estimates are higher than they were last year, when it was estimated that there was potential for 3,066 and 2,528 new jobs from

issued building permits and approved site development plans. This is reflective of the expanding economy and resulting increase in non-residential development during this time period.

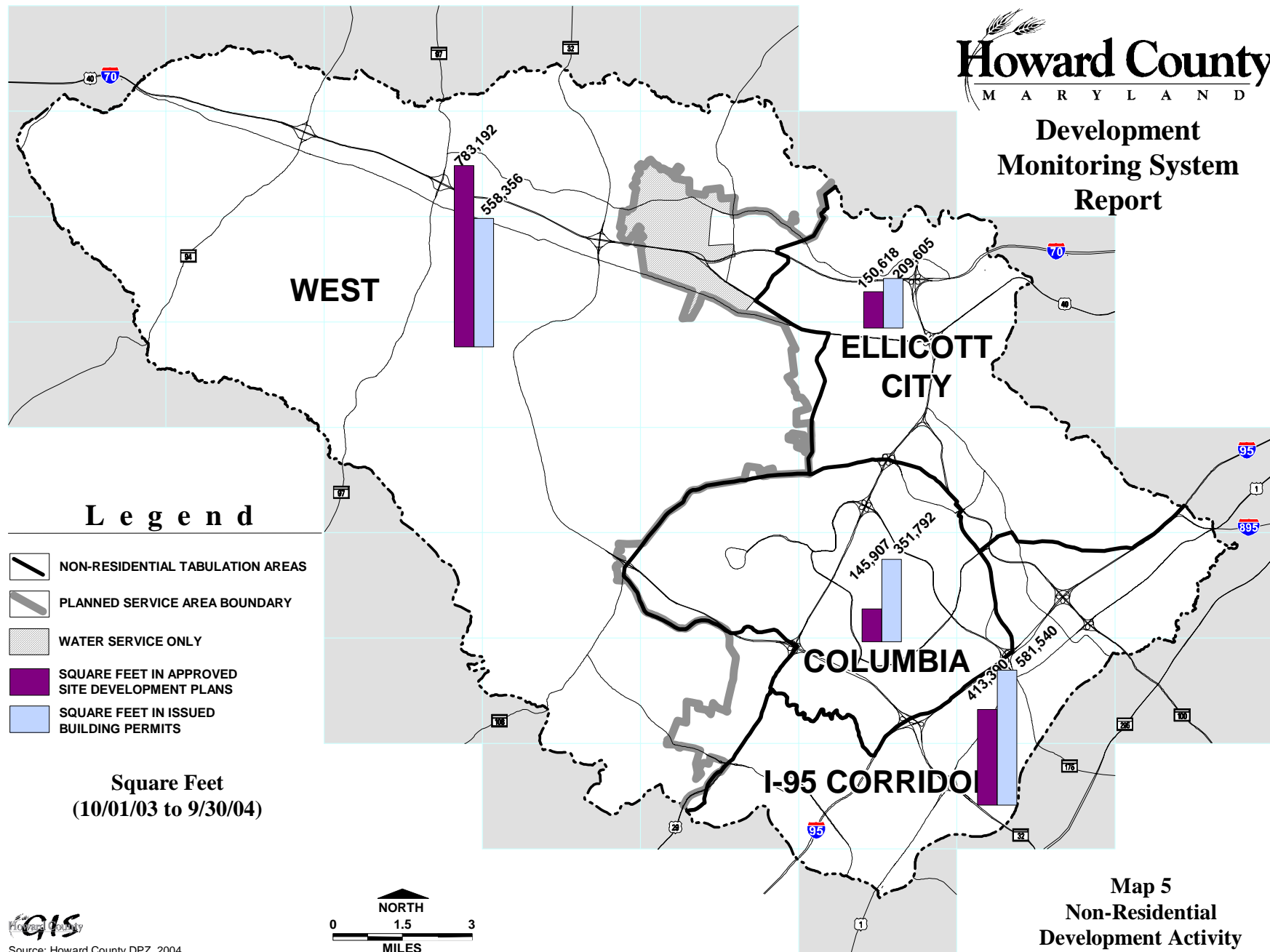
## Development Activity

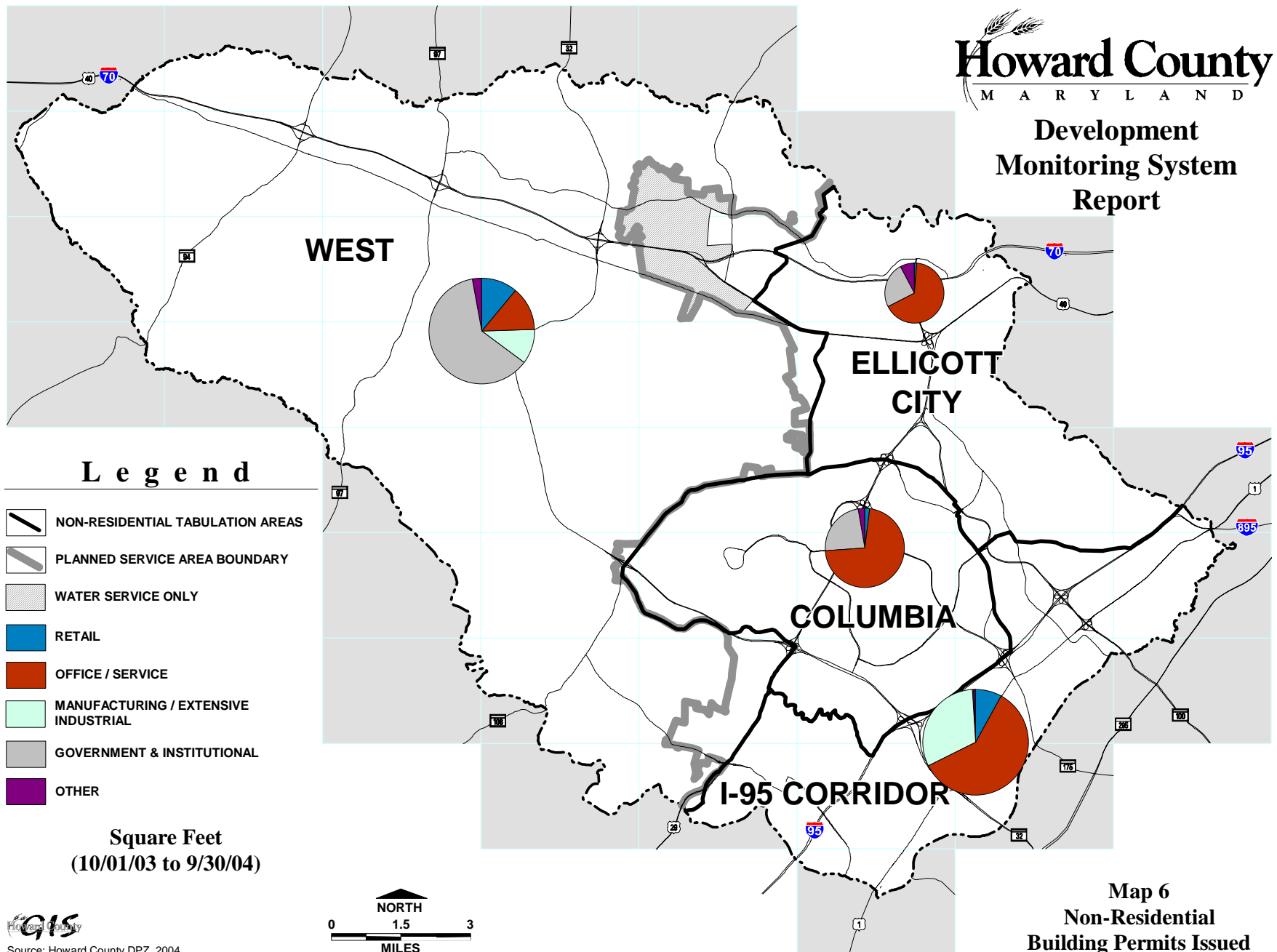
Last year, from October 1, 2003 to September 30, 2004, about 1.5 million square feet of building space were approved in site development plans. Building permits were issued for 1.7 million square feet. Most of the space was for office/service space, followed by governmental & institutional space. Manufacturing/extensive industrial and retail development were comparably less (Chart 6).

Chart 7 shows the results for the five year period from October 1, 1999 to September 30, 2004. During this time period about 12.2 million square feet were approved in site development plans and 11.5 million square feet in issued building permits. These represent averages of about 2.4 and 2.3 million square feet per year, respectively. Most of the new building space over the five years was for office/service uses followed by manufacturing/extensive industrial uses. Retail and government & institutional development were comparably less.

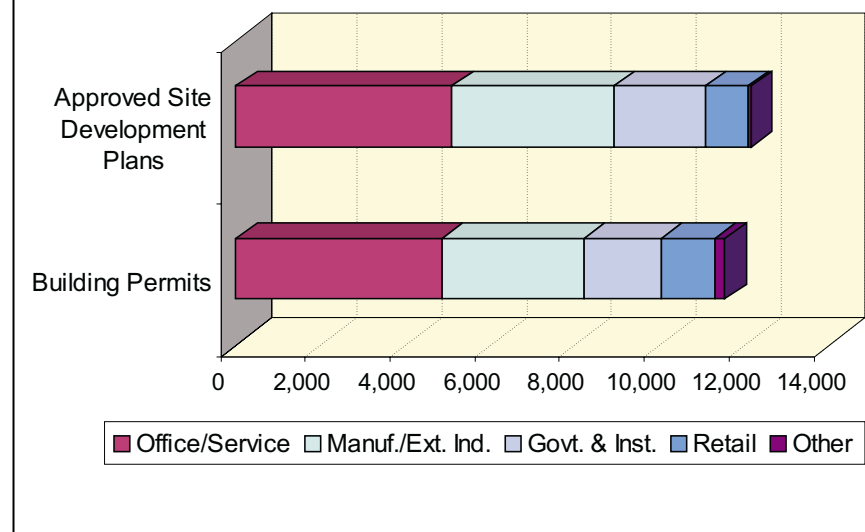








**Chart 7**  
**Non-Residential Square Feet (X 1,000)**  
**10/1/99 to 9/30/04**



## Development Location

Map 5 shows the one year total square footage by location for both building permits and approved site development plans. The map clearly indicates that a significant amount of the non-residential development activity has been concentrated in the I-95 Corridor and the West. Smaller amounts of non-residential development have occurred in Ellicott City and the Columbia.

It is important to note that the West area for non-residential tabulation purposes is not the same as the Rural West residential planning area. The non-residential West includes Maple Lawn Farms and Johns Hopkins APL which are currently undergoing commercial development. In addition, a significant portion of the non-residential development includes schools (the new Marriotts Ridge High School and Cedar Lane replacement) and as well as churches.

Map 6 shows the total square footage in issued building permits for the last year by type of development for each region. In addition to showing the building type breakdown in each region, the size of the pie charts also reflect the relative square footage in the issued permits. The overall Countywide square footage breakdown for permits issued last year is about 48 percent office/service space, 28 percent government & institutional space, 14 percent manufacturing/extensive industrial space, 7 percent retail space and about 3 percent for other uses.

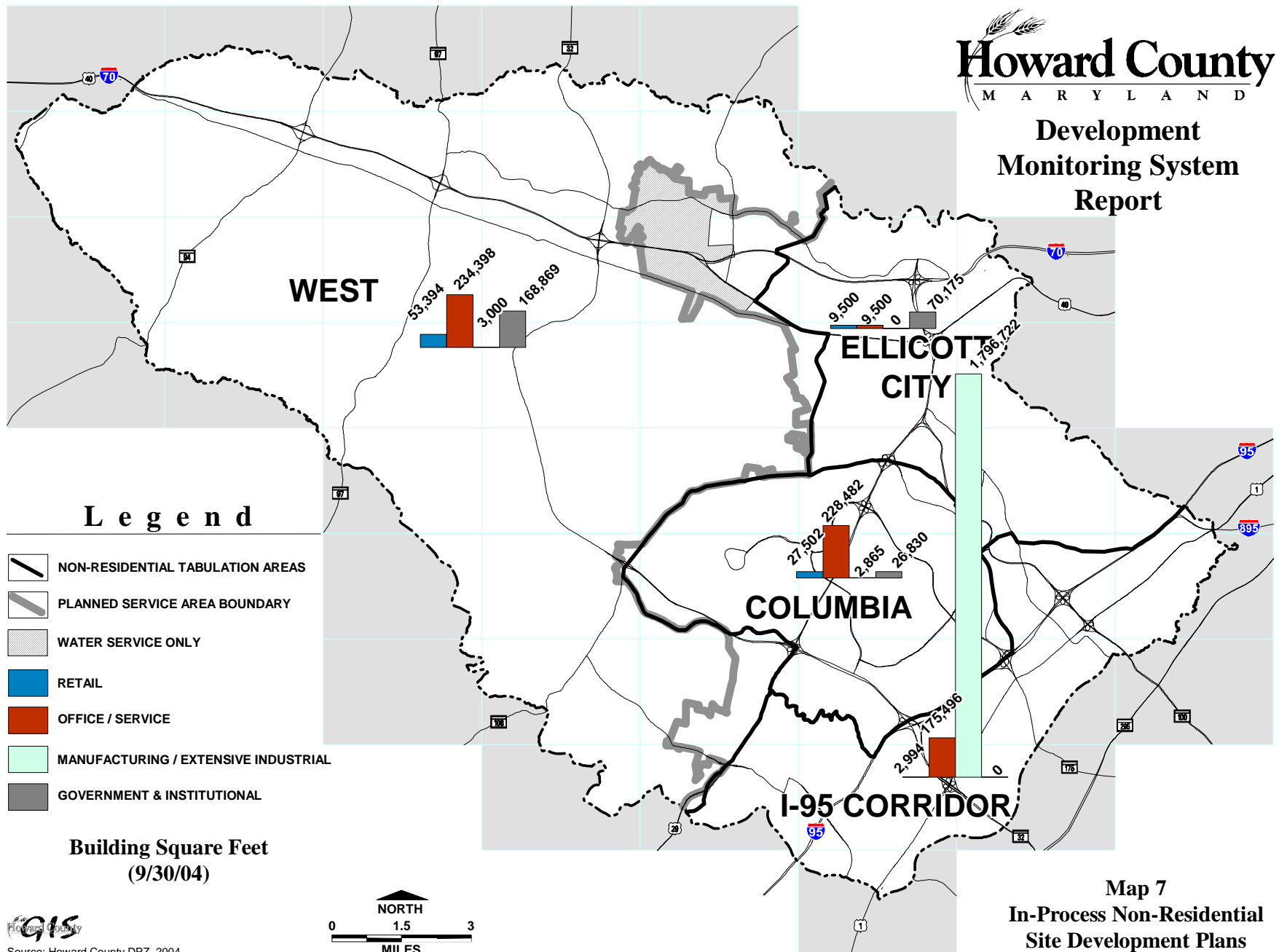
The map depicts how this varies by region with higher concentrations of office/service space in the I-95 Corridor and Columbia and a higher concentration of manufacturing/extensive industrial uses in the I-95 Corridor. A significant percentage of the government and institutional space is located on the West, where the new Marriotts Ridge High School and Cedar Lane replacement are located.

## Plans In Process

Map 7 shows the amount of non-residential building square footage in the site development plan process by location and by type of development. As of September 30, 2004, there was close to 2.9 million square feet in process. This is almost double the 1.5 million square feet in process for the previous year (as of September 30, 2003). The fact that considerably more planned space is currently in process bodes well for an increase in the future job growth rate in the County over the next few years.

Most of the in process-building space is in the I-95 Corridor. This is followed by planned space in the West, Columbia and Ellicott City, respectively.

Countywide, about 63 percent of the building space in the site development plan process is manufacturing/extensive industrial space. About 23 percent is office/service space and 9 percent government & institutional space. An additional 3 percent is retail space. The remaining 2 percent is for other uses.





# Residential Development

## Recorded Residential Subdivisions

The development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review (four buildable lots or less) involving only a final plan.

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units in the County, such as apartment buildings on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1999, the first year of this current DMS analysis period. Therefore, units from recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential *plans* recorded, the number of potential *units* from recorded lots, and the *acreage* of plans recorded have been compiled by the planning areas shown on Map 8. Annual data for development activity are reported for the period October 1 through September 30.

### Summary of Last Year's Result

Last year there were 1,318 housing units from recorded lots countywide in 148 subdivision plans totaling 1,959 acres (Table 1). Ellicott City had 41 percent of the total with 537. Elkridge had 36 percent of the total with 470 units. The remaining 311 units were in Columbia, the Southeast and the Rural West planning areas. These represent *net new unit* potential and do not include total recorded lots from resubdivisions. For example, resubdivisions may combine existing lots to create a smaller number of new lots compared to the original. If known, condo townhouse or apartment units are included in the

unit total for large parcel recordations.

Of the total 148 subdivision plans recorded last year, 31 percent were in the Rural West, followed by 30 percent in Ellicott City. The remaining 39 percent of plans were in Elkridge, the Southeast and Columbia. Note that the total plans include subdivisions and resubdivisions that do not necessarily create new unit potential, such as plats that revise lot lines or add easements.

Of the total 1,959 acres recorded, 1,186 acres, or about 61 percent, were in the Rural West. It should be noted, however, that of the 1,186 recorded acres in the West, 510 acres (43 percent) were for plats sending or receiving density as part of the density and cluster exchange subdivision process. Also, the recorded acres for all areas include subdivisions and

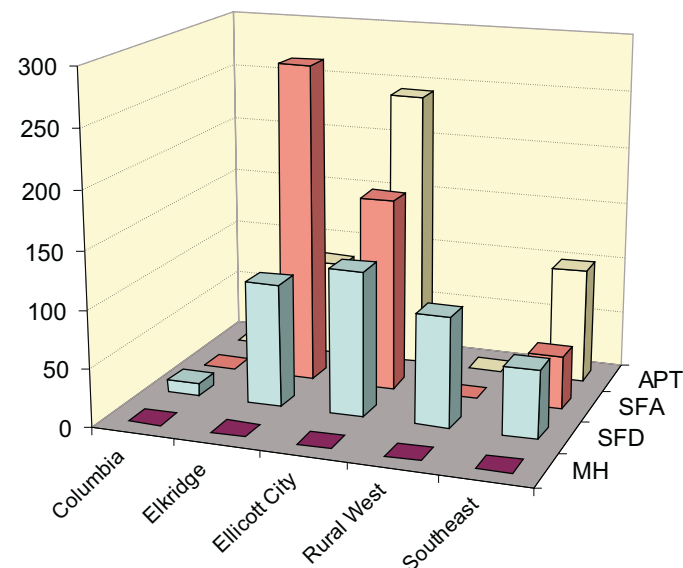
**Table 1**  
**Recorded Residential Subdivisions, 10/01/03 to 9/30/04**

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	11	1%	14	9%	63	3%
Elkridge	470	36%	20	14%	210	11%
Ellicott City	537	41%	45	30%	296	15%
Rural West	95	7%	46	31%	1,186	61%
Southeast	205	16%	23	16%	205	10%
<b>TOTAL</b>	<b>1,318</b>	<b>100%</b>	<b>148</b>	<b>100%</b>	<b>1,959</b>	<b>100%</b>

**Table 2**  
**Unit Potential from Recorded Lots by Unit Type, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	11	0	0	0	11	1%
Elkridge	107	279	84	0	470	36%
Ellicott City	126	168	243	0	537	41%
Rural West	95	0	0	0	95	7%
Southeast	59	46	100	0	205	16%
<b>TOTAL</b>	<b>398</b>	<b>493</b>	<b>427</b>	<b>0</b>	<b>1,318</b>	<b>100%</b>
<b>PERCENT</b>	<b>30%</b>	<b>37%</b>	<b>32%</b>	<b>0%</b>	<b>100%</b>	

**Chart 8**  
**Recorded Lots by Unit Type - New Unit Potential**  
**10/1/03 to 9/30/04**

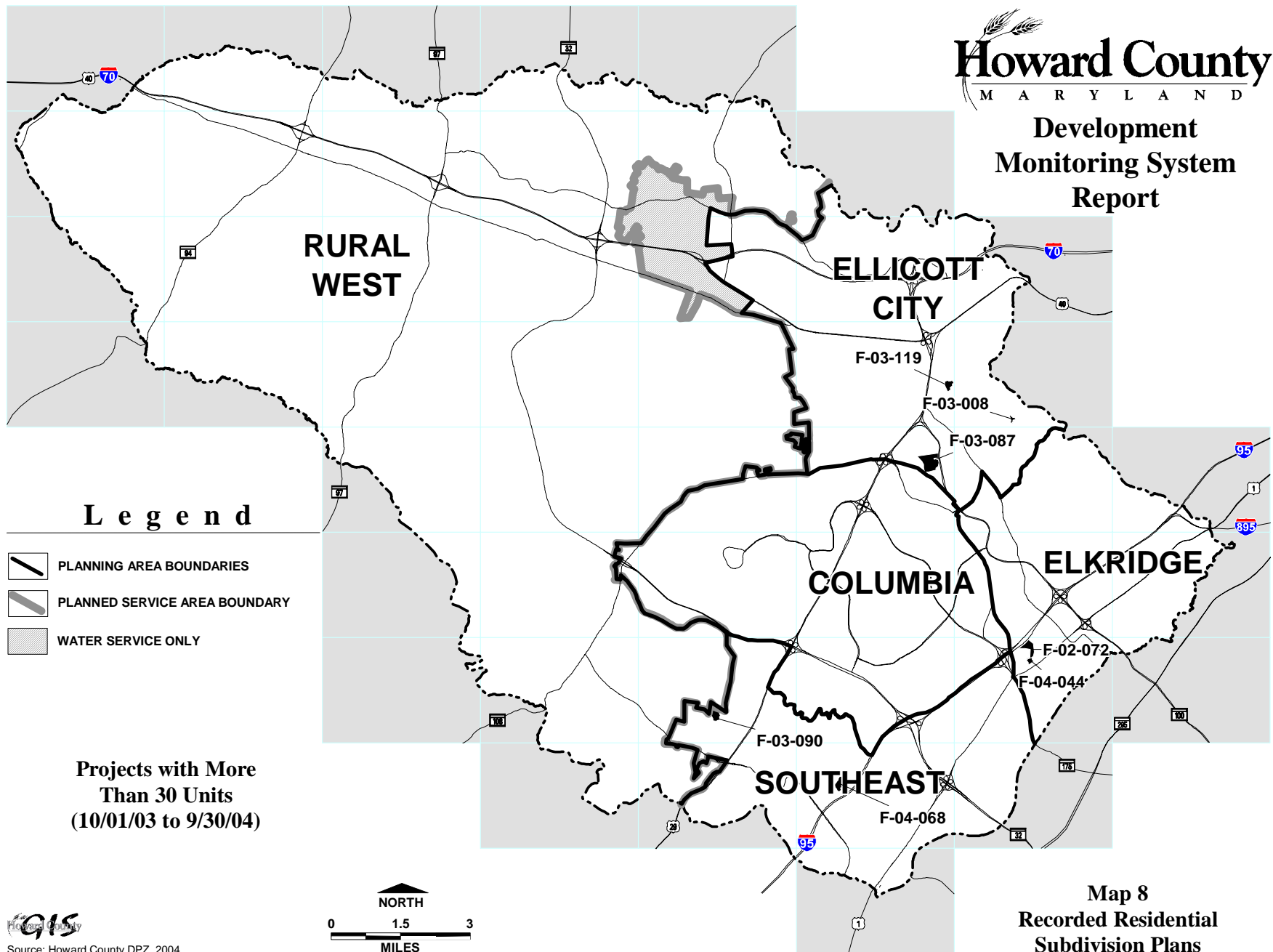


resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

Table 2 shows new units from recorded lots by unit type. Of the 1,318 units from recorded lots, 398 are for single family detached units (SFD), 493 are for single family attached or townhouse units (SFA) and the remaining 427 are for apartment units. This represents 30, 37 and 32 percent of the total units, respectively. Chart 8 shows these results graphically.

### Last Year's Projects - Greater than 30 Lots

Of the total 1,318 units from lots recorded last year, 974 or about 74 percent were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in three of the five planning areas. The precise location of these plans are shown on Map 8.





**Table 3**  
**Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/03 to 9/30/04**

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-04-044	The Oaks at Waters Edge	APT - All MIHU	84	<b>351</b>
	F-02-072	The Oaks at Waters Edge	SFA - 12 MIHU	267	
Ellicott City	F-03-087	Montjoy	SFA and APT	361	<b>436</b>
	F-03-008	Autumn View	SFD and SFA	43	
	F-03-119	The Woods of Tiber Branch	SFD	32	
Southeast	F-03-090	Maple Lawn - Phase 3	SFA	46	<b>187</b>
	F-03-090	Maple Lawn - Phase 3	SFD	41	
	F-04-068	Emerson	APT	100	
<b>TOTAL</b>					<b>974</b>

Two of the larger subdivisions, The Oaks At Waters Edge, are located in Elkridge. This includes 84 moderate income apartment units and 267 town-house units, 12 of which are designed to be moderate income. There are three large subdivisions in Ellicott City -- Montjoy, Autumn View and The Woods of Tiber Branch. In the Southeast, there were 46 SFA units and 41 SFD units recorded as part of Maple Lawn Farms. In addition, a plat designed for 100 apartment units in Emerson was also recorded.

## Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 1999 to September 30, 2004. Over this five year period lots for 5,494 units countywide in 755 subdivision plans totaling 12,989 acres were recorded. This equates to a five year average of 1,099 units per year. Note that the acreage figure represents all acreage on recorded plats including resubdivisions, sending and receiving preservation parcels, and recordations that do not add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 5 summarizes the number of units from recorded lots by unit type for each of the last five years. Over the last five years, recorded lots created the potential for 2,905 single family detached units, 53 percent of the total 5,394. A total of 1,670, 30 percent, were single family attached units and the remaining 919, 17 percent, were for apartments units. (As indicated

earlier, these represent *net new unit* potential from recordations and do not include totals from resubdivisions.) Chart 9 is a graphical representation of recorded lots by unit type over the last five years.

## Last Year Compared to Five Year Trends

Last year resulted in the largest number of new units from recorded lots with 1,318. This compares to 1,251, 1,143, 990 and 792 units for each of the 4 previous years, respectively, and is 219 units greater than the 1,099 five year average.

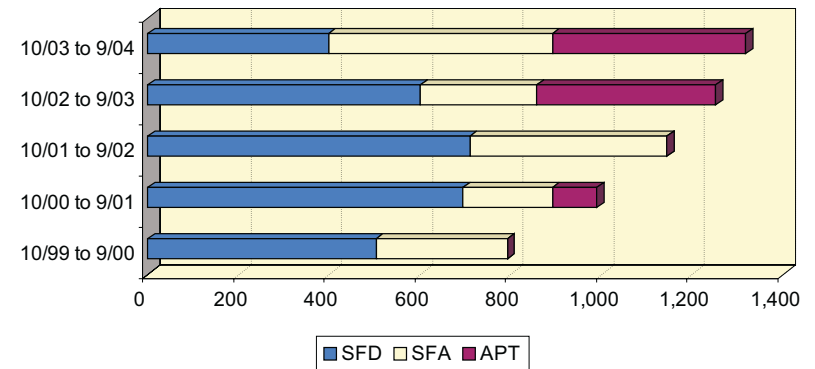
**Table 4**  
**Recorded Residential Subdivisions, 10/01/99 to 9/30/04**

Year	Units	Plans	Acreage
10/99 to 9/00	792	168	2,661
10/00 to 9/01	990	139	2,777
10/01 to 9/02	1,143	140	2,499
10/02 to 9/03	1,251	160	3,093
10/03 to 9/04	1,318	148	1,959
<b>TOTAL</b>	<b>5,494</b>	<b>755</b>	<b>12,989</b>
<b>5 YEAR AVG.</b>	<b>1,099</b>	<b>151</b>	<b>2,598</b>

**Table 5**  
**Unit Potential From Recorded Lots by Unit Type, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	503	289	0	0	792
10/00 to 9/01	694	198	98	0	990
10/01 to 9/02	710	433	0	0	1,143
10/02 to 9/03	600	257	394	0	1,251
10/03 to 9/04	398	493	427	0	1,318
<b>TOTAL</b>	<b>2,905</b>	<b>1,670</b>	<b>919</b>	<b>0</b>	<b>5,494</b>
<b>PERCENT</b>	<b>53%</b>	<b>30%</b>	<b>17%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVG.</b>	<b>581</b>	<b>334</b>	<b>184</b>	<b>0</b>	<b>1,099</b>

**Chart 9**  
**Recorded Lots by Unit Type - New Unit Potential**  
**10/1/99 to 9/30/04**



# In-Process Residential Subdivisions

As indicated in the previous section, the development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a minor subdivision review;
- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2004 are tabulated and compared with those in process a year earlier (as of September 30, 2003).

## Number of Plans

Thirteen more residential plans were in process as of September 30, 2004 than there were one year earlier – 249 plans in 2004 compared to 236 plans in 2003 (Table 6).

For the current year, Ellicott City had the greatest number of residential plans in process with 72, followed by the Rural West with 68. Elkridge and the Southeast had 59 and 35 plans in process, respectively. Columbia had 15 plans in process.

Of the 249 plans in process on September 30, 2004, 148 were final plans, 48 were sketch plans, 40 were preliminary equivalent sketch plans and 13 were preliminary plans.

## Number of Potential Units

Similar to the number of plans, there were more potential units in process as of September 30, 2004 compared to a year earlier, 7,345 units compared to 6,819 units (Table 7). Ellicott City had the largest number of units in

**Table 6**  
**Number of Residential Subdivision Plans in Process, 09/30/04**  
**(With comparisons to Countywide total as of 09/30/03)**

Planning Area	Preliminary Equivalent				TOTAL PLANS
	Sketch	Sketch	Preliminary	Final	
Columbia	1	2	1	11	15
Elkridge	13	4	2	40	59
Ellicott City	17	9	2	44	72
Rural West	9	20	4	35	68
Southeast	8	5	4	18	35
<b>TOTAL</b>	<b>48</b>	<b>40</b>	<b>13</b>	<b>148</b>	<b>249</b>
<b>As of 09/30/03</b>	<b>54</b>	<b>29</b>	<b>15</b>	<b>138</b>	<b>236</b>

process in 2004 with 2,616, or 36 percent, of the countywide total. This is followed by Elkridge with 1,959 units in process (27 percent). The Southeast, Rural West, Columbia planning areas had the remaining 2,770 units in process (38 percent). The large number of units in the Southeast are from the two large phased projects there, Maple Lawn and Emerson. Large projects in Ellicott City include Turf Valley and Waverly, including the age restricted units there .

It is important to note that a significant number of the 7,345 potential units in process are part of phased projects with building planned for future years. As shown in Table 8, 4,699 units are part of phased plans, with building planned as far out as 2015 (in the case of Maple Lawn). This represents 64 percent of the total units in process. Most of the phased projects are in the Southeast and Ellicott City. The larger phased projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties in Ellicott City.

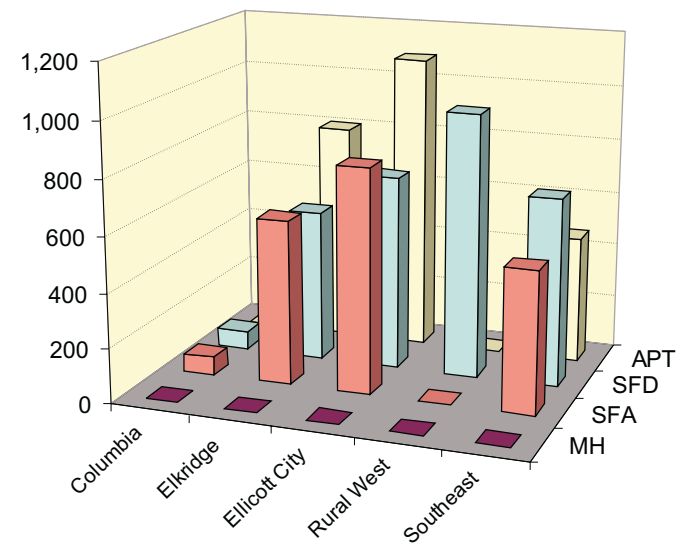
As reflected in Table 7, 41 percent of the units in process are single family detached units. About 27 percent are single family attached units and an-

other 32 percent are apartment units. Table 9 shows details by plan stage and unit type for this year by planning area. Chart 10 graphically illustrates the units in process by unit type for each planning area.

**Table 7**  
**Number of Potential Units from Subdivision Plans in Process, 09/30/04**  
(With comparisons to Countywide total as of 09/30/03)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	67	66	0	0	133
Elkridge	554	602	803	0	1,959
Ellicott City	711	819	1,086	0	2,616
Rural West	967	0	0	0	967
Southeast	687	518	465	0	1,670
<b>TOTAL</b>	<b>2,986</b>	<b>2,005</b>	<b>2,354</b>	<b>0</b>	<b>7,345</b>
<b>PERCENT</b>	<b>41%</b>	<b>27%</b>	<b>32%</b>	<b>0%</b>	<b>100%</b>
<b>As of 09/30/03</b>	<b>3,073</b>	<b>1,562</b>	<b>2,184</b>	<b>0</b>	<b>6,819</b>

**Chart 10**  
**Subdivisions in Process - New Unit Potential**  
**9/30/04**



**Table 8**  
**Potential Units from Phased Projects**

Planning Area	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0	0
Elkridge	38	55	301	261	264	105	82	60	0	0	0	1,166
Ellicott City	304	217	456	354	305	220	94	0	0	0	0	1,950
Southeast	0	141	316	320	145	150	100	75	75	45	41	1,408
Rural West	43	83	49	0	0	0	0	0	0	0	0	175
<b>TOTAL</b>	<b>385</b>	<b>496</b>	<b>1,122</b>	<b>935</b>	<b>714</b>	<b>475</b>	<b>276</b>	<b>135</b>	<b>75</b>	<b>45</b>	<b>41</b>	<b>4,699</b>

Note: Does not include phased project units on already recorded plats.

**Table 9**  
**Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/04**

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	66	0	0	66	18	0	0	0	18
Elkridge	131	602	617	0	1,350	82	0	0	0	82
Ellicott City	384	775	936	0	2,095	169	0	0	0	169
Rural West	238	0	0	0	238	340	0	0	0	340
Southeast	458	372	405	0	1,235	33	0	0	0	33
<b>TOTAL</b>	<b>1,211</b>	<b>1,815</b>	<b>1,958</b>	<b>0</b>	<b>4,984</b>	<b>642</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>642</b>

Planning Area	Preliminary					Final				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	11	0	0	0	11	38	0	0	0	38
Elkridge	72	0	0	0	72	269	0	186	0	455
Ellicott City	9	0	0	0	9	149	44	150	0	343
Rural West	194	0	0	0	194	195	0	0	0	195
Southeast	84	59	0	0	143	112	87	60	0	259
<b>TOTAL</b>	<b>370</b>	<b>59</b>	<b>0</b>	<b>0</b>	<b>429</b>	<b>763</b>	<b>131</b>	<b>396</b>	<b>0</b>	<b>1,290</b>

TOTAL - 09/30/04				
SFD	SFA	APT	MH	TOTAL
67	66	0	0	133
554	602	803	0	1,959
711	819	1,086	0	2,616
967	0	0	0	967
687	518	465	0	1,670
<b>2,986</b>	<b>2,005</b>	<b>2,354</b>	<b>0</b>	<b>7,345</b>

## Number of Acres

As of September 30, 2004 a total of 6,362 acres of residential land in were in the subdivision process. This is about 589 acres more than the previous year, at which time there were 5,773 acres in process (Table 10).

The most acreage in process was in the final plan phase (2,348 acres). The sketch plan stage had 2,222 acres in process and the preliminary equivalent sketch plan stage had 1,195 acres in process. There were also 597 acres at the preliminary plan stage.

## Major Projects

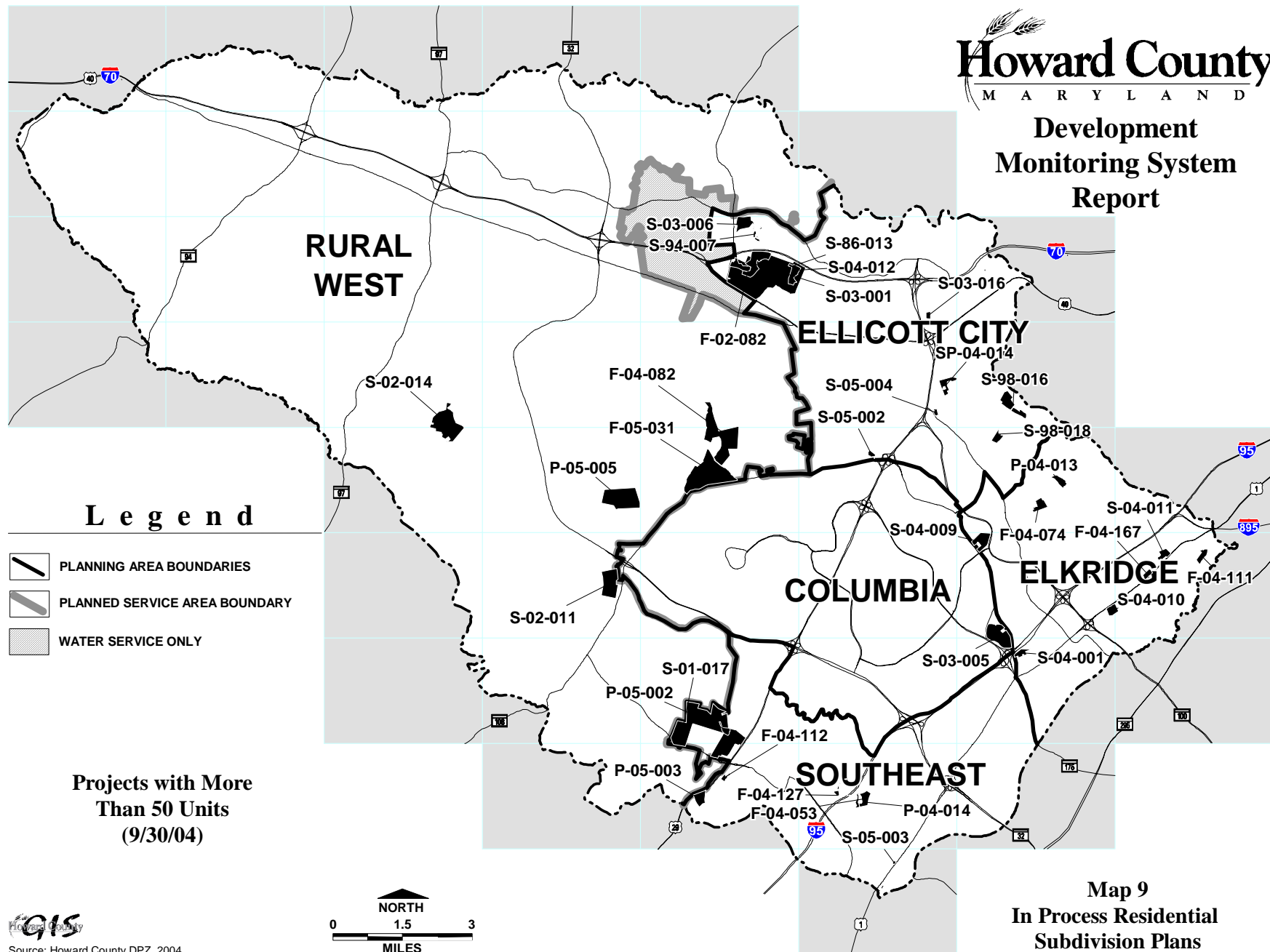
Table 11 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 9 shows the location of these projects. Some of the larger projects in this list include Emerson, Maple Lawn Farms, Turf Valley, Waverly Woods, Elkridge Crossing, Shipley's Grant, and Deep Run Crossing.

**Table 10**  
**Acreage of Residential Subdivision Plans in Process, 09/30/04**  
**(With comparisons to Countywide total as of 09/30/03)**

Planning Area	Preliminary Equivalent Sketch				TOTAL ACRES
	Sketch	Preliminary	Final		
Columbia	7	8	7	32	54
Elkridge	186	74	31	388	679
Ellicott City	910	115	25	347	1,397
Rural West	661	972	468	1,442	3,543
Southeast	458	26	66	139	689
<b>TOTAL</b>	<b>2,222</b>	<b>1,195</b>	<b>597</b>	<b>2,348</b>	<b>6,362</b>
<b>As of 09/30/03</b>	<b>2,822</b>	<b>1,110</b>	<b>443</b>	<b>1,398</b>	<b>5,773</b>

**Table 11**  
**In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/04**

<b>Region</b>	<b>File Number</b>	<b>Plan Name</b>	<b>Unit Type</b>	<b>Units</b>	<b>TOTAL</b>
Columbia	S-03-005	Benson East	SFA	66	<b>66</b>
Elkridge	S-04-009	Shipley's Grant	SFA, APT - 40 MIHU	396	
	S-04-011	Elkridge Crossing	SFA, APT - 56 MIHU	359	
	S-04-010	Deep Run Crossing	SFA, APT - 49 MIHU	318	
	F-04-167	Elkridge Town Center	APT - 19 MIHU	186	
	S-04-001	Village Towns	SFA, APT - 26 MIHU	146	
	P-04-013	Owens Property	SFD	93	
	F-04-111	Hunters Ridge	SFD	53	
	F-04-074	Dennis Preserve	SFD	52	
Ellicott City	S-86-013	Turf Valley	SFD, SFA, APT	748	
	S-03-006	The Courtyards at Waverly Woods - East	SFA, APT - Age Restricted	321	
	S-03-001	Villages at Turf Valley	SFD, SFA, APT	241	
	F-02-082	Oakmont at Turf Valley	APT	150	
	S-03-016	Hoenes Property	APT	144	
	S-05-004	Montgomery Road Apartments	APT - Age Rest. - 14 MIHU	130	
	S-04-012	Turf Valley	APT	115	
	S-94-007/F-04-184	Waverly - Phase VII	SFA	100	
	S-98-016	Autumn River	SFD, SFA	97	
	S-05-002	Dorsey Crossing	SFA - 10 MIHU	86	
	S-98-018	Worthington Fields	SFD	59	
	SP-04-014	The Woods At Tiber Branch	SFD	54	
					<b>2,245</b>
Rural West	P-05-005	Walnut Grove	SFD	88	
	P-04-009/F-04-082	Riverwood - Phases 1 and 2	SFD	84	
	SP-02-013/F-05-031	Benedict Farm - Phases 1 and 2	SFD	80	
	S-02-014	The Warfields II	SFD	75	
	S-02-011	Turnbury Grove	SFD	55	
Southeast	S-01-017	Maple Lawn Farms	SFD, SFA, APT	850	
	S-99-012/P-04-014	Emerson	SFD, SFA, APT	265	
	F-04-127	Emerson	SFA, APT - 60 Age Rest. MIHU	93	
	F-04-053	Emerson	SFD	87	
	S-05-003	Hill Street Apts and Retail	APT - 12 MIHU	79	
	P-05-003	Jamestown Landing	SFD	64	
	P-05-002	Maple Lawn Farms	SFA	59	
	F-04-112	Cherrytree Park - Phase III	SFA - 5 MIHU	54	
<b>TOTAL</b>					<b>5,847</b>



# Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. SDP's are generally not required for lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development *plans* approved, the number of non-residential *lots* approved, and the *acreage* of approved plans have been compiled for each of these areas and are discussed below. The analysis includes last year's site development plan activity as well as activity for the last five years.

## Summary of Last Year's Results

Last year there were 1,960 housing units approved in 104 site development plans totaling about 379 acres (Table 12). Ellicott City had the most units approved with 863, or 44 percent of the total. Elkridge had 21 percent of the total with 417 approved units, followed by Columbia with 294 approved units and the Southeast with 243 approved units. The Rural West had 143 units approved.

Of the total 104 site development plans approved last year, 44 were in Ellicott City, followed by 24 each in the Southeast and Elkridge. Columbia had 11 plans and the Rural West had only 1.

Of the total 379 residential acres approved through site development plans, 123 acres, or 32 percent, were in Ellicott City. A total of 88 acres were approved in Elkridge, followed by 73 acres approved in the Rural West and 66 acres in the Southeast. There were 29 acres approved in the Columbia.

Table 13 shows new units from approved site development plans by unit type. Of the 1,960 approved units, 436 were for single family detached units, 761 were for single family attached or townhouse units, and 720 were for apartment units. This represents 22 percent, 39 percent, and 37 percent of the total units, respectively. The remaining 2 percent were from

43 mobile homes. Chart 11 shows these results graphically.

**Table 12**  
**Approved Residential Site Development Plans, 10/01/03 to 9/30/04**

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	294	15%	11	11%	29	8%
Elkridge	417	21%	24	23%	88	23%
Ellicott City	863	44%	44	42%	123	32%
Rural West	143	7%	1	1%	73	19%
Southeast	243	12%	24	23%	66	17%
<b>TOTAL</b>	<b>1,960</b>	<b>100%</b>	<b>104</b>	<b>100%</b>	<b>379</b>	<b>100%</b>

**Table 13**  
**Approved Units from SDP's by Unit Type, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	12	78	204	0	<b>294</b>	<b>15.0%</b>
Elkridge	129	234	54	0	<b>417</b>	<b>21.3%</b>
Ellicott City	204	197	462	0	<b>863</b>	<b>44.0%</b>
Rural West	71	72	0	0	<b>143</b>	<b>7.3%</b>
Southeast	20	180	0	43	<b>243</b>	<b>12.4%</b>
<b>TOTAL</b>	<b>436</b>	<b>761</b>	<b>720</b>	<b>43</b>	<b>1,960</b>	<b>100.0%</b>
<b>PERCENT</b>	<b>22%</b>	<b>39%</b>	<b>37%</b>	<b>2%</b>	<b>100%</b>	

## Last Year's Projects - Greater than 30 Units

Of the total 1,960 units approved in site development plans last year, 1,739 or about 89 percent were in site development plans consisting of more than 30 units. These larger projects, shown in Table 14, are located in all five planning areas. The location of these plans are shown on Map 10.



**Table 14**  
**Approved Residential SDP's, Projects With More Than 30 Units, 10/01/03 to 9/30/04**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-03-080	Town Center	APT - Age Restricted	156	<b>282</b>
	SDP-03-163	Kendall Overlook	SFA - Age Restricted	78	
	SDP-04-021	Columbia Town Center	APT	48	
Elkridge	SDP-03-041	The Oaks at Waters Edge	SFA - 29 Offsite MIHU	192	<b>356</b>
	SDP-04-122	Cascade Overlook	SFD	80	
	SDP-03-138	Center 9500	APT - Age Restricted	54	
	SDP-04-054	Village Towns	SFA - 5 Offsite MIHU	30	
Ellicott City	SDP-04-007	Montjoy	APT	244	<b>680</b>
	SDP-02-094	Village Crest	APT - Age Restricted	151	
	SDP-04-006	Montjoy	SFA	118	
	SDP-04-058	Autumn View	SFD	74	
	SDP-03-035	Village Crest	SFA - Age Restricted	51	
	SDP-04-120	Montjoy	APT	42	
Southeast	SDP-03-146	Emerson	SFA	89	<b>278</b>
	SDP-04-121	Maple Lawn Farms	SFA	65	
	SDP-04-112	Maple Lawn Farms	SFD	47	
	SDP-01-095	Brentwood Manor Expansion	Mobile Homes	43	
	SDP-04-047	North Laurel Park	SFD	34	
Rural West	SDP-03-030	Homeland	SFD, SFA	143	<b>143</b>
<b>TOTAL</b>					<b>1,739</b>

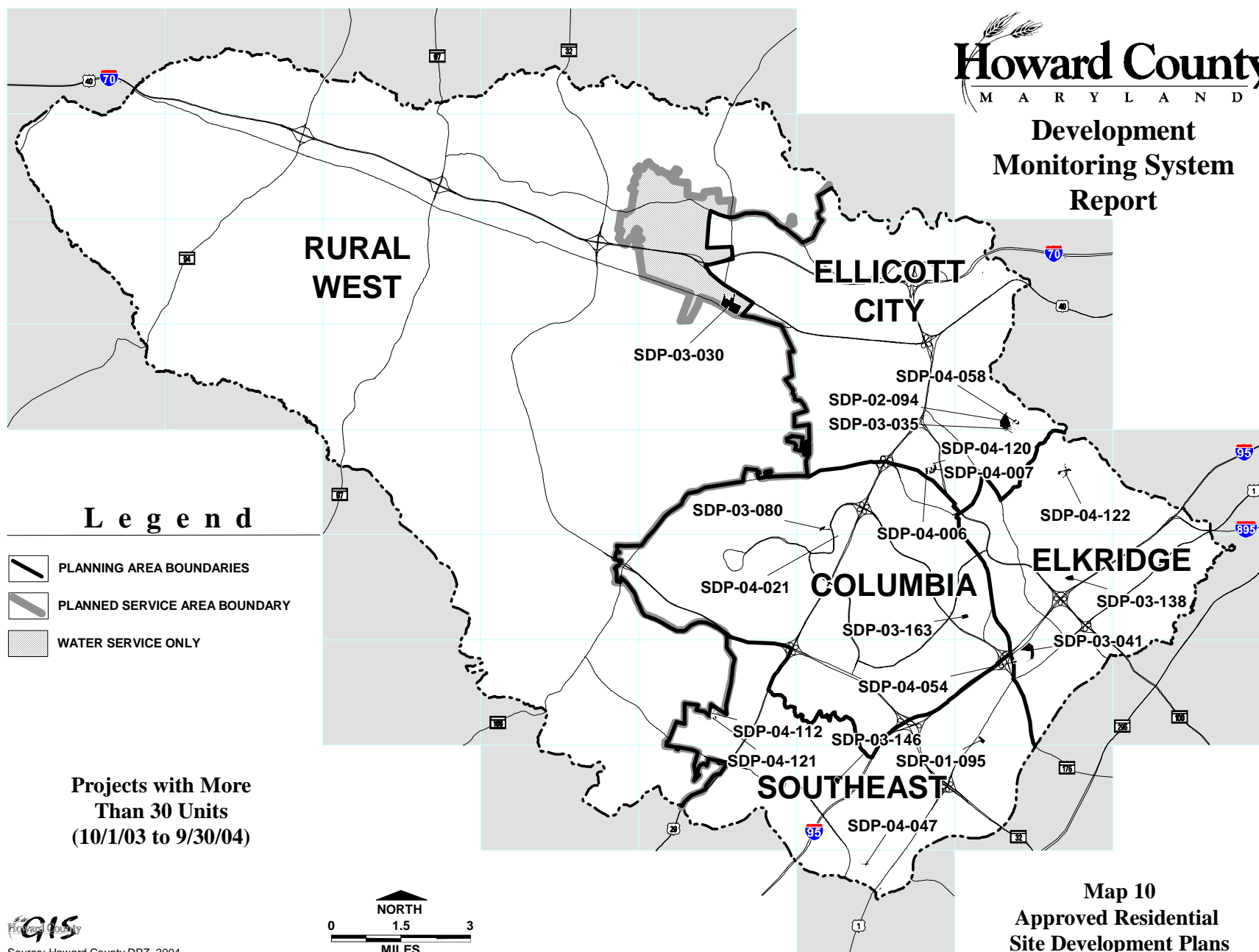
In Columbia, there were three large plans, two apartment projects (one age-restricted) located in Town Center and another age-restricted townhouse project near Snowden River and Rt 175. In Elkridge, 192 age restricted units were approved as part of the Oaks at Waters Edge development. Three other large projects were also approved there. In Ellicott City, six large SDP's were approved, three of which are part of Montjoy consisting of 286 apartment units and 118 townhouse units. In the Southeast, 278 units were part of larger site development plans. These include SFA and SFD units in Emerson and Maple Lawn Farms, two large phased plans.

## Five Year Results

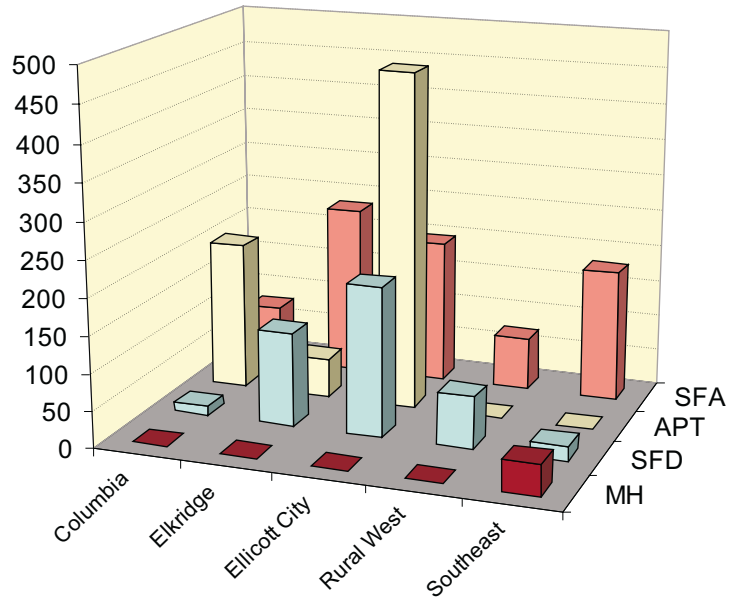
Table 15 shows the approved residential site development plans for the last five years from October 1, 1999 to September 30, 2004. Over this five year

period 7,017 units were approved countywide in 396 site development plans totaling about 1,363 acres. This equates to a five year average of 1,403 units per year. With 1,960 approved units, last year had the greatest number of approved units of all five years, 557 more units than the 1,403 five year average.

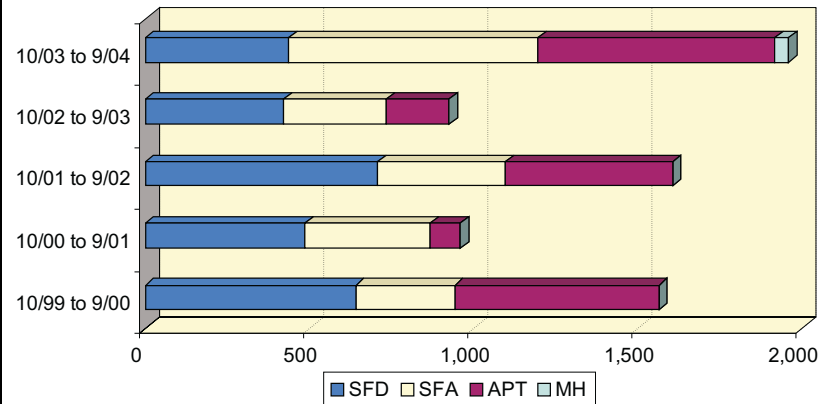
Table 16 shows the approved units by unit type for each of the last five years. Over the five year period, 38 percent of the units were single family detached, 31 percent were single family attached and 30 percent were apartments. The five year totals are 2,696, 2,144 and 2,134 for single family detached, single family attached and apartment units, respectively. Chart 12 shows these results graphically.



**Chart 11**  
**Units in Approved Site Development Plans**  
**10/1/03 to 9/30/04**



**Chart 12**  
**Housing Units in Approved SDP's, 10/1/99 to 9/30/04**



**Table 15**  
**Approved Residential Site Development Plans, 10/01/99 to 9/30/04**

Year	Units	Plans	Acreage
10/99 to 9/00	1,565	56	233
10/00 to 9/01	959	61	178
10/01 to 9/02	1,607	77	359
10/02 to 9/03	926	98	214
10/03 to 9/04	1,960	104	379
<b>TOTAL</b>	<b>7,017</b>	<b>396</b>	<b>1,363</b>
<b>5 YEAR AVG.</b>	<b>1,403</b>	<b>79</b>	<b>273</b>

**Table 16**  
**Approved Units in Residential Site Development Plans, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	641	302	622	0	1,565
10/00 to 9/01	488	380	91	0	959
10/01 to 9/02	709	389	509	0	1,607
10/02 to 9/03	422	312	192	0	926
10/03 to 9/04	436	761	720	43	1,960
<b>TOTAL</b>	<b>2,696</b>	<b>2,144</b>	<b>2,134</b>	<b>43</b>	<b>7,017</b>
<b>PERCENT</b>	<b>38%</b>	<b>31%</b>	<b>30%</b>	<b>1%</b>	<b>100%</b>
<b>5 YEAR AVG.</b>	<b>539</b>	<b>429</b>	<b>427</b>	<b>9</b>	<b>1,403</b>

# In Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of *plans*, potential *units* and *acreage* currently being processed as of September 30, 2004 are tabulated and compared to those in process a year earlier (as of September 30, 2003).

As indicated earlier, large residential lots 20,000 square feet or larger in the Rural West do not require site development plans. Therefore, the tables shown in this section do not include most units proposed in the West.

## Number of Plans

There were more residential site development plans were in process as of September 30, 2004 compared to one year earlier, 61 plans compared to 47 plans (Table 17).

As of September 30, 2004, Ellicott City had 18 plans in process, followed by Elkridge and the Southeast with 15 each and then Columbia with 11. There were no plans in process in the Rural West.

**Table 17**  
**Number of Residential SDP's In Process, 09/30/03 & 09/30/04**

Planning Area	2004	2003
Columbia	11	4
Elkridge	15	18
Ellicott City	18	21
Rural West	0	1
Southeast	15	17
<b>TOTAL</b>	<b>59</b>	<b>61</b>

## Number of Potential Units

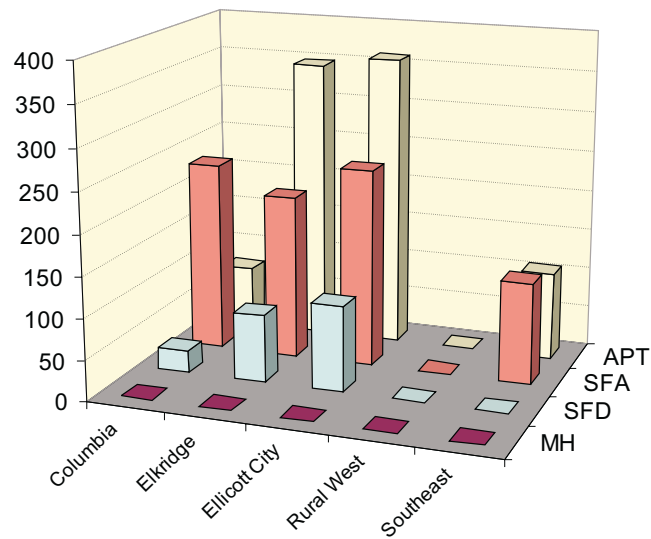
There were less units in process as of September 30, 2004 compared to a year earlier, 1,911 units compared to 2,489 units (Table 18). Ellicott City had the largest number of units in process in 2004 with 710, 37 percent of the countywide total. This is followed by Ellicott City and Columbia with 633 (33 percent) and 335 (18 percent) units in process, respectively. The Southeast had 233 units in process as of September 30, 2004.

As indicated in Table 18, the greatest number of units in process are for apartments with 891 proposed units in 2003. This is followed by 805 proposed single family attached or townhouse units. There were 215 proposed single family detached units. Chart 13 graphically illustrates the units in process by unit type for the current year. (As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the table and chart would not include most units proposed in the West.)

**Table 18**  
**Number of Potential Units from Site Development Plans in Process, 09/30/04**  
**(With comparisons to Countywide total as of 09/30/03)**

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	27	234	74	0	335
Elkridge	83	202	348	0	633
Ellicott City	105	244	361	0	710
Rural West	0	0	0	0	0
Southeast	0	125	108	0	233
<b>TOTAL</b>	<b>215</b>	<b>805</b>	<b>891</b>	<b>0</b>	<b>1,911</b>
<b>As of 09/30/03</b>	<b>303</b>	<b>858</b>	<b>1,285</b>	<b>43</b>	<b>2,489</b>

**Chart 13**  
**SDP's in Process - New Unit Potential**  
**9/30/04**



## Number of Acres

As of September 30, 2004 a total of 356 acres of residential land were in the site development plan process. This is 25 acres more than the previous year, at which time there were 331 acres in process (Table 19).

**Table 19**  
**Acreage of Residential SDP's In Process, 09/30/04**

Planning Area	2004	2003
Columbia	63	26
Elkridge	115	94
Ellicott City	135	83
Rural West	0	73
Southeast	43	55
<b>TOTAL</b>	<b>356</b>	<b>331</b>

The greatest amount of in process acreage was in the Ellicott City, with 135 acres. There were 115 acres in process in Elkridge, 63 acres in Columbia and 43 acres in the Southeast.

## Major Projects

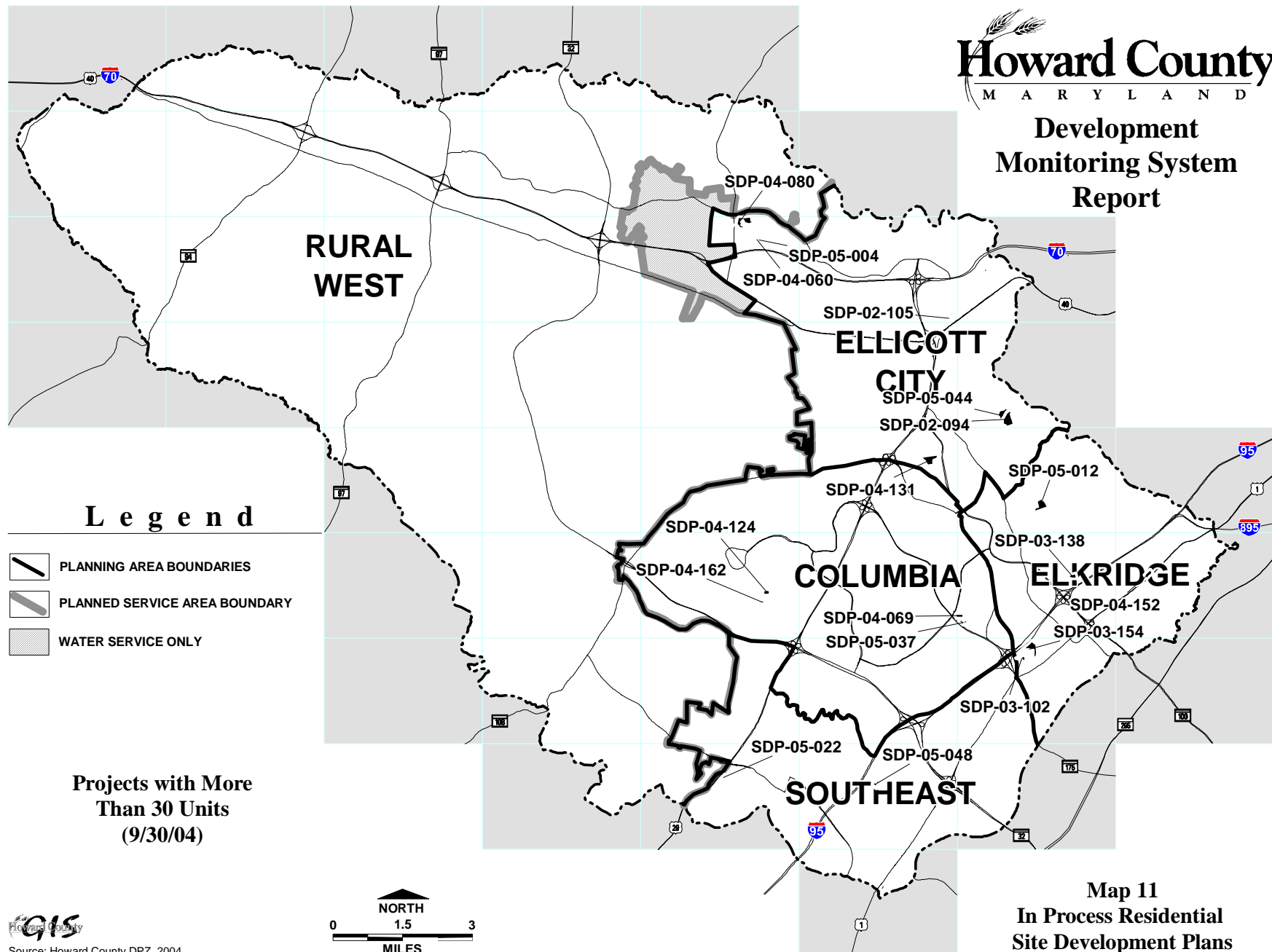
Table 20 shows a list of potential units from larger projects with 30 units or more. Map 11 shows the location of these projects. Of the 1,911 units in the site development plan process, 1,653 or about 86 percent were in projects with 30 units or more. About 59 percent of the units in these larger projects, 973 units, are part of age-restricted developments.

Ellicott City had 638 units in process as part of larger projects, followed by Elkridge with 602, Columbia with 314 and the Southeast with 99.

Larger projects in Ellicott City include SFD units in Montjoy, age-restricted SFA and apartment units in Village Crest and Waverly Woods and apartment units in Kaiser Farm. Larger projects in Elkridge include townhouse units in the Oaks at Waters Edge and Village Towns, age-restricted apartments as part of the Centre 9500 proposal, standard apartments as part of Elkridge Town Center and SFD units in the Dennis Preserve subdivision. Large projects in the Southeast include SFA units in Phase 3 of Cherrytree Park and Stone Lake. Large projects in Columbia include age-restricted units in the Snowden Ridge Business park and at Kendall Overlook as well as in Scotts Glen North and South.

**Table 20**  
**In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/04**

<b>Region</b>	<b>File Number</b>	<b>Plan Name</b>	<b>Unit Type</b>	<b>Units</b>	<b>TOTAL</b>
Columbia	SDP-05-037	Kendall Overlook	APT, SFA - Age Restricted	110	<b>314</b>
	SDP-04-069	Snowden River Business Park	SFA - Age Restricted	76	
	SDP-04-124	Scotts Glen North	SFD, SFA - 8 MIHU - Age Restricted	73	
	SDP-04-162	Scotts Glen South	SFA, APT - 6 MIHU - Age Restricted	55	
Elkridge	SDP-03-138	Elkridge Town Center	APT - 19 MIHU	186	<b>602</b>
	SDP-04-152	Centre 9500	APT - Age Restricted	162	
	SDP-03-154	Village Towns	SFA - 20 MIHU	127	
	SDP-03-102	The Oaks at Waters Edge	SFA - 12 MIHU	75	
	SDP-05-012	Dennis Preserve	SFD	52	
Ellicott City	SDP-02-094	Village Crest	APT - Age Restricted	176	<b>638</b>
	SDP-05-044	Village Crest	SFA - Age Restricted	117	
	SDP-04-060	Waverly Gardens	APT - Age Restrictcd - All MIHU	102	
	SDP-04-080	Courtyards of Waverly Woods - East Ph. 1	SFA, APT - Age Restricted	102	
	SDP-04-131	Montjoy	SFD	62	
	SDP-05-004	GTW's Waverly Woods	SFA	44	
	SDP-02-105	Kaiser Farm	APT	35	
Southeast	SDP-05-022	Cherrytree Park - Ph. 3	SFA - 5 MIHU	54	<b>99</b>
	SDP-05-048	Stone Lake	SFA	45	
<b>TOTAL</b>					<b>1,653</b>





# Residential Building Permits & Use and Occupancy Permits

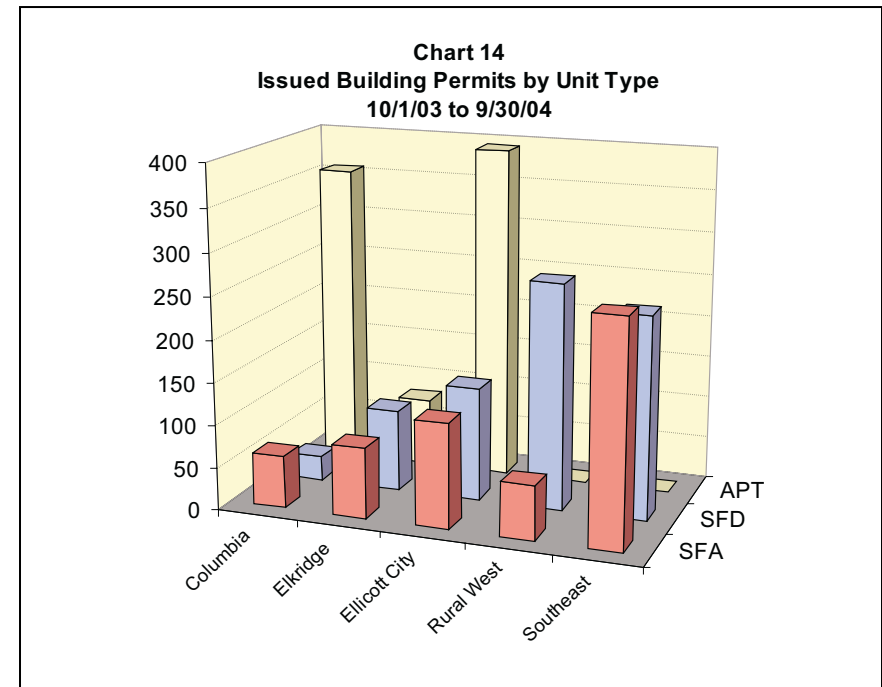
The final stage of the development process is the issuance of building permits. In Howard County, building permits are required for all construction. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the five planning areas.

## Issued Building Permits

### Summary of Last Year's Results

Last year from October 1, 2003 to September 30, 2004, the County issued 2,191 residential building permits for new construction (Table 21). Of all planning areas, Ellicott City had the most building permits issued with 651, 30 percent of the total. The Southeast had 502 issued permits (23%). Columbia had 448 issued permits (20%). There were 330 issued permits in the Rural West (15%) and 260 in Elkridge (12%).

Countywide, 35 percent of the permits were for single family units. About 27 percent were for SFA units and 38 percent for apartment units. The greatest number of SFD units were in the Rural West, followed by the Southeast. No permits for mobile homes were issued last year. Chart 14 shows these results graphically by planning area.



Map 12 shows the building permit activity by statistical area of the County. Seven statistical areas each had more than 100 permits issued. Of these, two statistical areas, 2-21 and 6-21 had the greatest number with 307 and 259 issued permits, respectively. These areas include the Montjoy and Emerson developments. The map indicates the activity in the remaining statistical areas for various ranges.

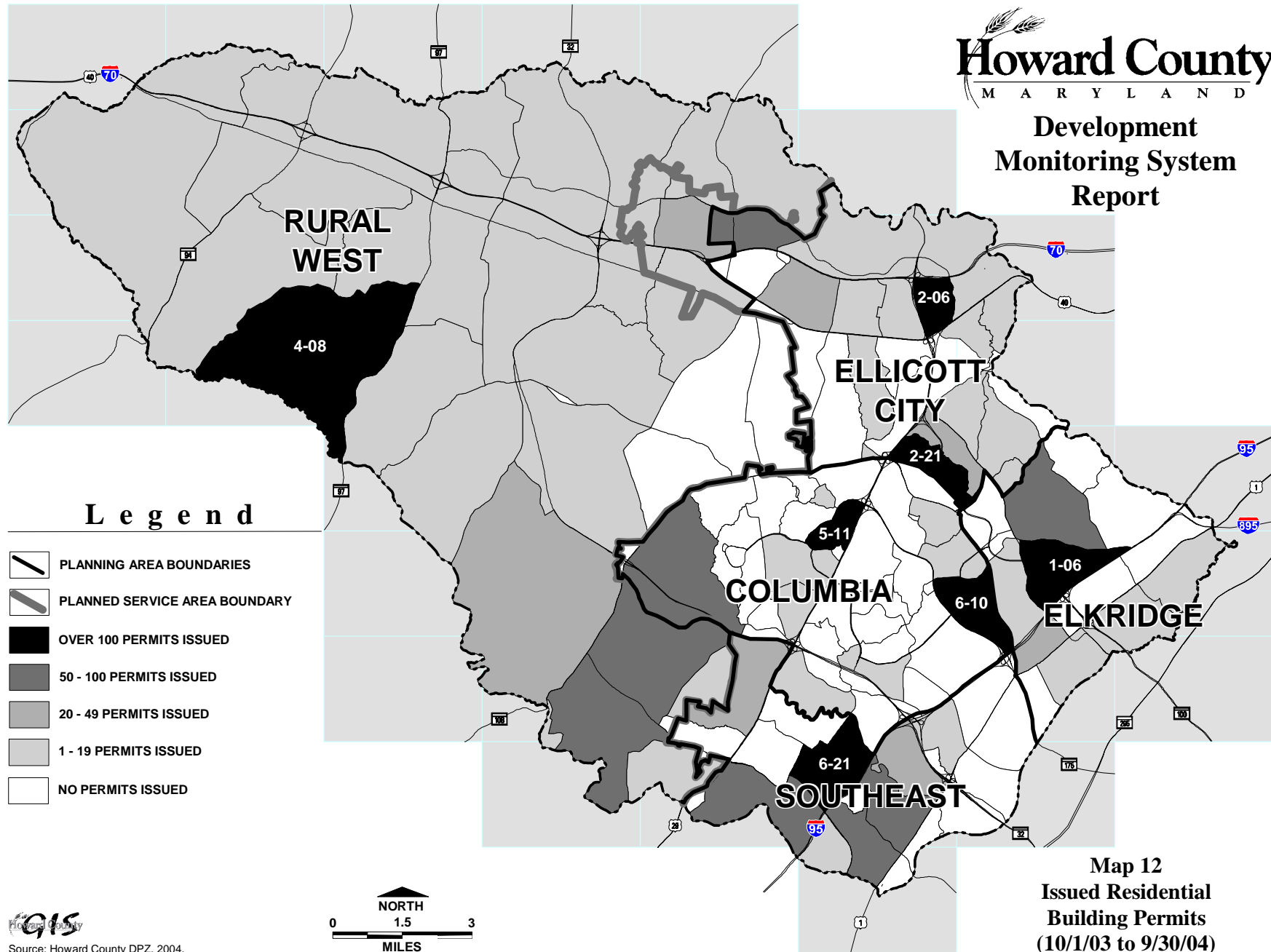
### Last Year's Projects - Greater Than 30 Units

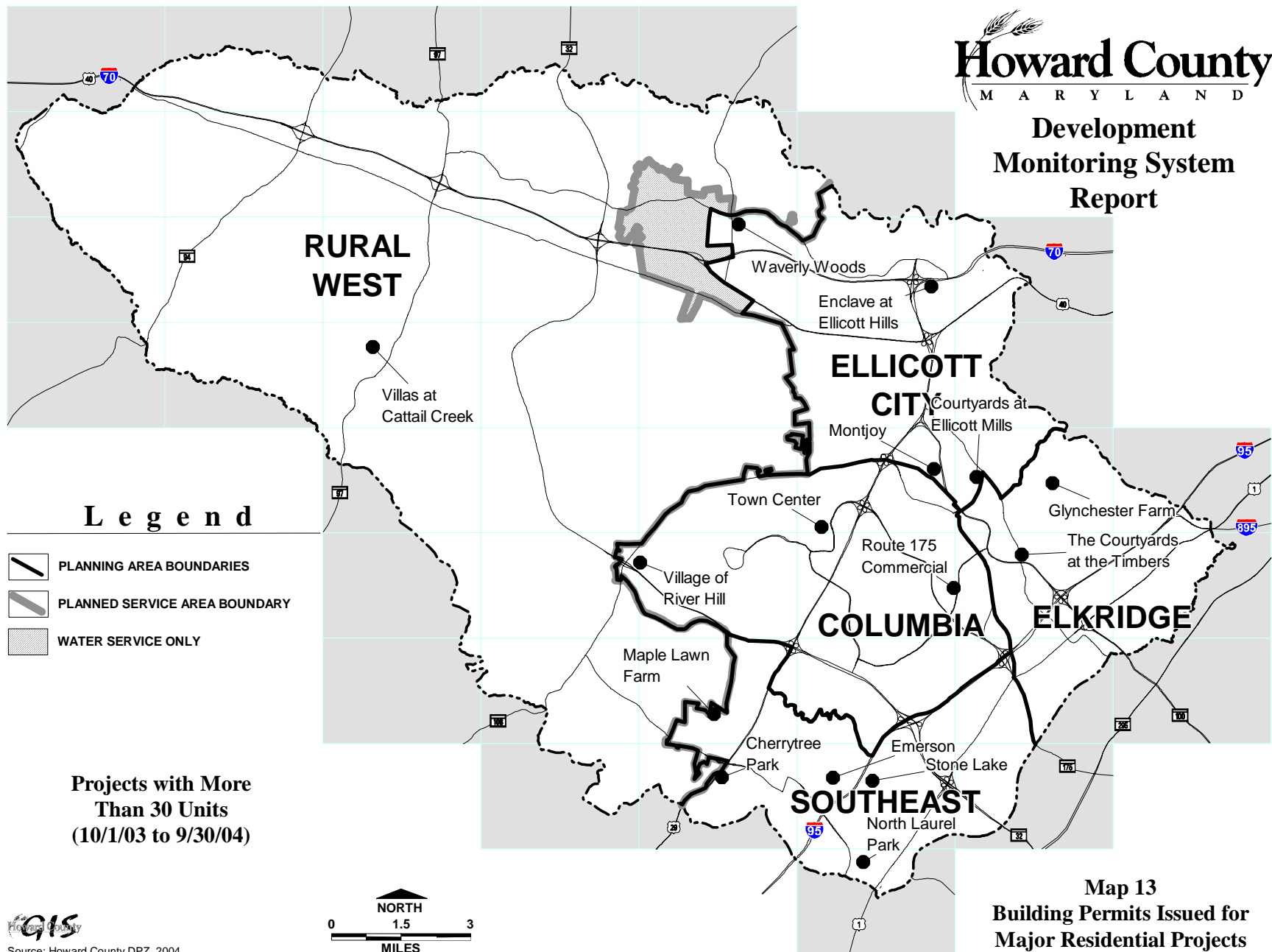
Table 22 summarizes the issued residential building permits in larger subdivisions with more than 30 units. About two-thirds, or 1,449 of the total 2,191 permits issued last year, fall into this category. Map 13 shows the locations of each of the subdivisions.

**Table 21**  
**Issued Residential Building Permits by Unit Type, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	29	62	357	0	448	20%
Elkridge	96	84	80	0	260	12%
Ellicott City	134	124	393	0	651	30%
Rural West	266	64	0	0	330	15%
Southeast	239	263	0	0	502	23%
<b>TOTAL</b>	<b>764</b>	<b>597</b>	<b>830</b>	<b>0</b>	<b>2,191</b>	<b>100%</b>
<b>PERCENT</b>	<b>35%</b>	<b>27%</b>	<b>38%</b>	<b>0%</b>	<b>100%</b>	







**Table 22**  
**Issued Residential Building Permits in**  
**Subdivisions With More Than 30 Units, 10/01/03 to 9/30/04**

Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Town Center	Apartments	156	<b>391</b>
	Route 175 Commercial	Apartments	100	
	Village of River Hill	Apartments	53	
	Town Center	Townhomes/Apartments	82	
Elkridge	The Courtyards at the Timbers	Townhomes/Apartments	94	<b>136</b>
	Glynchester Farm	Single Family Detached	42	
Ellicott City	Montjoy	Apartments	286	<b>521</b>
	Enclave at Ellicott Hills	Townhomes/Apartments	151	
	Courtyards at Ellicott Mills	Townhomes	33	
	Waverly Woods	Single Family Detached/Townhomes	51	
Rural West	Villas at Cattail Creek	Single Family Detached/Townhomes	85	<b>85</b>
Southeast	Cherry Tree Park	Single Family Detached/Townhomes	50	<b>452</b>
	Emerson	Single Family Detached/Townhomes	258	
	Stone Lake	Single Family Detached/Townhomes	58	
	North Laurel Park	Single Family Detached	49	
	Maple Lawn Farm	Single Family Detached/Townhomes	37	
<b>TOTAL</b>				<b>1,449</b>

### Five Year Results

Over five years, from October 1, 1999 to September 30, 2004, a total of 9,064 residential building permits have been issued in Howard County (Table 23). This is an average of about 1,813 permits issued per year. Last year had the greatest number of issued permits since 1999/2000. However,

**Table 23**  
**Issued Residential Building Permits by Unit Type, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	1,425	342	651	0	<b>2,418</b>
10/00 to 9/01	1,158	320	126	0	<b>1,604</b>
10/01 to 9/02	1,046	383	213	0	<b>1,642</b>
10/02 to 9/03	749	250	210	0	<b>1,209</b>
10/03 to 9/04	764	597	830	0	<b>2,191</b>
<b>TOTAL</b>	<b>5,142</b>	<b>1,892</b>	<b>2,030</b>	<b>0</b>	<b>9,064</b>
<b>PERCENT</b>	<b>57%</b>	<b>21%</b>	<b>22%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVG.</b>	<b>1,028</b>	<b>378</b>	<b>406</b>	<b>0</b>	<b>1,813</b>

it should be noted that a large number of permits were issued in June, 2003 (675 of the total 2,191 permits, or 31%) in order to beat the new \$1.00 per square foot school excise tax that went into effect July 1.

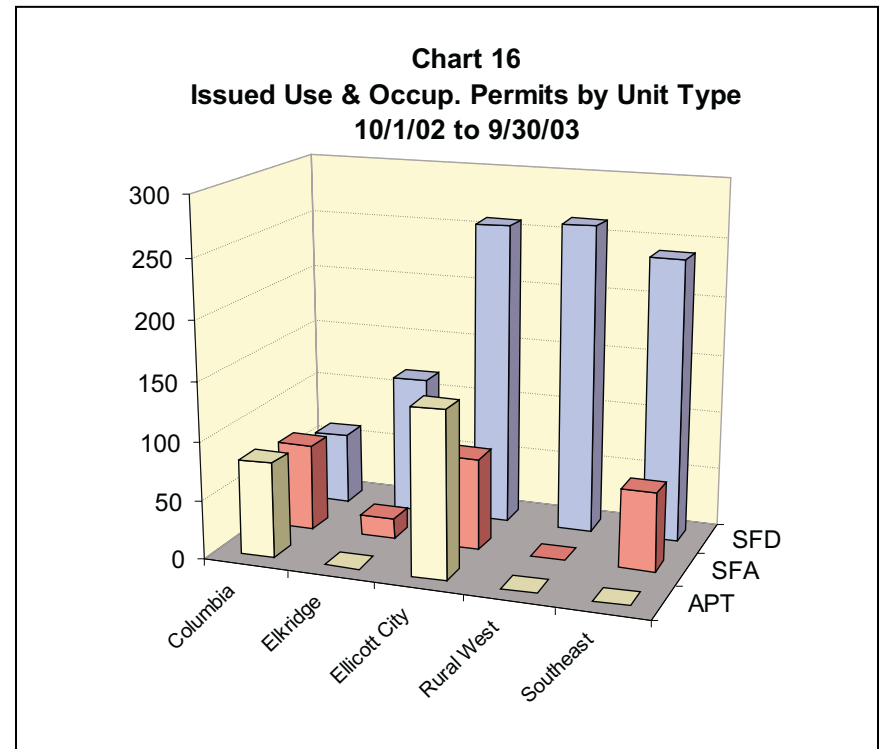
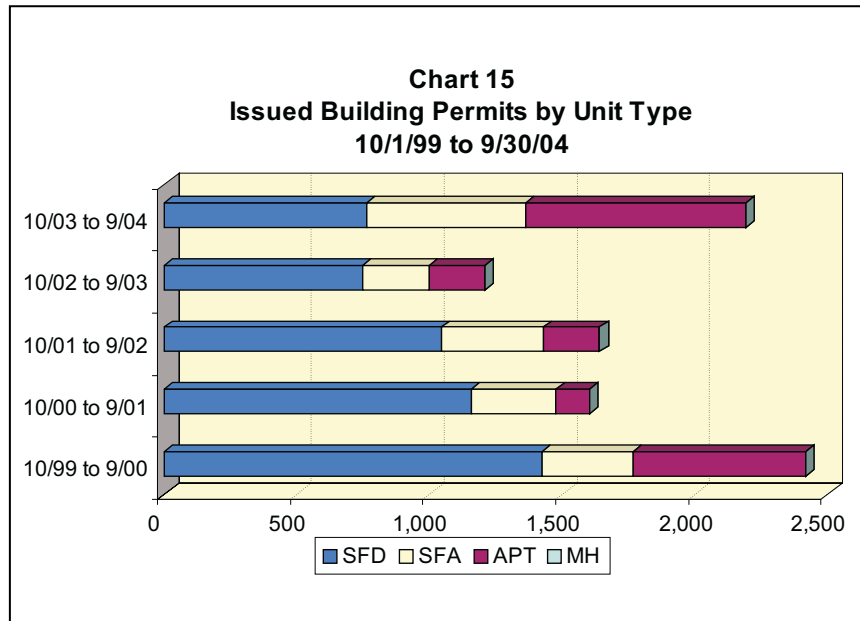
Of the 9,064 total permits issued over five years, 5,142, or 65 percent, were for single family detached units. There were 1,892 permits (21 percent) for single family attached units and 2,030 permits (22 percent) for apartment units. Chart 15 shows the results by unit type graphically over time.

## Use and Occupancy Permits

### Summary of Last Year's Results

Last year from October 1, 2003 to September 30, 2004, the County issued 1,522 use and occupancy permits (Table 24). Of all planning areas, Ellicott City had the most with 383, 25 percent of the total. This is followed by the Southeast with 382 issued use and occupancy permits. Columbia had 300 issued permits, followed by the Rural West and Elkridge with 296 and 161 issued permits, respectively. Chart 16 shows these results graphically.

Countywide, 47 percent of the permits were for single family units. About 26 percent were for single family attached units and 27 percent were for apartment units. No permits for mobile homes were issued last year.



**Table 24**  
**Issued Use and Occupancy Permits by Unit Type, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	33	62	205	0	300	20%
Elkridge	90	35	36	0	161	11%
Ellicott City	130	85	168	0	383	25%
Rural West	270	26	0	0	296	19%
Southeast	190	192	0	0	382	25%
<b>TOTAL</b>	<b>713</b>	<b>400</b>	<b>409</b>	<b>0</b>	<b>1,522</b>	<b>100%</b>
<b>PERCENT</b>	<b>47%</b>	<b>26%</b>	<b>27%</b>	<b>0%</b>		

**Table 25**  
**Issued Use and Occupancy Permits by Unit Type, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	1,708	425	361	0	2,494
10/00 to 9/01	1,346	379	179	0	1,904
10/01 to 9/02	1,011	367	573	0	1,951
10/02 to 9/03	940	235	222	0	1,397
10/03 to 9/04	713	400	409	0	1,522
<b>TOTAL</b>	<b>5,718</b>	<b>1,806</b>	<b>1,744</b>	<b>0</b>	<b>9,268</b>
<b>PERCENT</b>	<b>62%</b>	<b>19%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVE.</b>	<b>1,144</b>	<b>361</b>	<b>349</b>	<b>0</b>	<b>1,854</b>

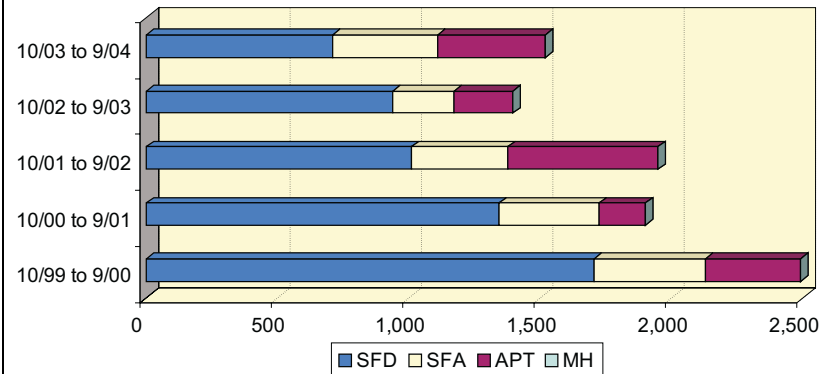
### Five Year Results

Over five years, from October 1, 1999 to September 30, 2004, a total of 9,268 use and occupancy permits have been issued in Howard County (Table 25). This is an average of about 1,854 permits per year.

Of the 9,268 total permits issued over five years, 5,718, or 62 percent, were for single family detached units. There were 1,806 permits (19 percent) for single family attached units, 1,744 permits (19 percent) for apartment units and no permits for mobile homes. Chart 17 shows the results by unit type graphically over time.

The number of issued permits has decreased from a high of 2,494 in 99/00 to 1,904 in 00/01 and 1,951 in 01/02, and then dropped to 1,397 in 02/03, then rebounding up slightly to 1,522 last year. Over this time period, the number of completions for single family detached units has steadily declined from a high of 1,708 in 99/00 to only 713 last year.

**Chart 17**  
**Issued Use & Occupancy Permits by Unit Type**  
**10/1/99 to 9/30/04**



# Housing Unit Allocations

Subdivision applications submitted after April 10, 1992 are subject to the Adequate Public Facilities Ordinance (APFO) and may require housing unit allocations. The typical time period between initial subdivision submission and occupancy is three years. Consequently, plan approvals after the chart adoption in 2004 are granted allocations for the 2007 allocation year. Some submissions contain phasing over several years and are granted allocations for future years, if available. The number of allocations available is established annually by County Council resolution. The allocation chart is based on the General Plan growth projections by planning area. Depending upon zoning and plan type, *tentative allocations* are usually assigned upon sketch plan approval. Allocations become *permanent* upon final plat recordation.

In accordance with APFO, since the 1997 allocation year (1994 plan submission year), the allocations have been adjusted to reflect regional development activity using a “rolling average.” The intent of the rolling average is to provide a means to annually adjust the allocation chart to achieve the overall General Plan targets. The rolling average formula uses: 1) the number of allocations granted, 2) the number of lots recorded in projects that were exempt from APFO, and 3) the General Plan target.

Table 26 is the current allocation chart, which the County Council adopted July 6, 2004. Total allocations are shown by the five planning areas in ad-

dition to a Senior East and a Route 1 overlay district. Senior east allocations are dedicated to age restricted housing in the eastern part of the County (consisting of all planning areas except the Rural West). Allocations for the Route 1 set-aside are reserved only for units in mixed use projects east of U.S. 95. Refer to the maps shown earlier in this report for an outline of the areas. From the July 6, 2004 chart adoption until the next chart adoption (planned for July 2005), the Department of Planning and Zoning may assign year 2007 allocations.

As allowed under APFO, to provide some flexibility, up to 20 percent more allocations than available can be granted in each planning area for the 2007 allocation year. If this is utilized and more allocations are granted than available for the current allocation year, then available allocations in future years are reduced based on the rolling average. Consequently, areas with strong demand show a decrease in available allocations over time. On the other hand, for areas that do not have strong demand available allocations increase over time.

As of October 22, 2004, 1,391 allocations had been granted for the 2006 Allocation Year (Table 27). For three planning areas -- ElkrIDGE, the Southeast and the Rural West -- plus the Senior East pool all available allocations have been granted including the extra 20 percent. All additional projects in these planning areas are therefore placed in a waiting bin. As of

**Table 26**  
**Housing Unit Allocation Chart, Adopted July 6, 2004**

Planning Area	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Columbia	577	421	297	220	158	158	158	158	158	14
ElkrIDGE	96	91	97	130	164	164	164	164	164	168
Ellicott City	308	330	334	348	358	358	358	358	358	269
Southeast	176	190	240	302	320	320	320	320	320	300
Rural West	188	239	235	250	250	250	250	250	250	250
Senior East	255	237	220	250	250	250	250	250	250	250
Route 1	334	333	333	250	250	250	250	250	250	250
<b>TOTAL</b>	<b>1,934</b>	<b>1,841</b>	<b>1,756</b>	<b>1,750</b>	<b>1,750</b>	<b>1,750</b>	<b>1,750</b>	<b>1,750</b>	<b>1,750</b>	<b>1,500</b>

October 22, 2004, all the other areas still had available capacity.

Comprehensive and phased subdivisions may request and receive allocations for future years. As of October 22, 2004 a total of 1,900 allocations have been granted for future years (Table 28). These future year allocations have been given to the following subdivisions: Shipley's Grant and Summer haven in Elkridge; Autumn River, Dorsey's Crossing, the Hoenes Property and Turf Valley in Ellicott City; Emerson and Maple Lawn Farms in the Southeast; the Daschuk Property, Hopkins Choice and the Owings Property in the Rural West; and Centre 9500, Mary Lane, the Courtyards at Waverly Woods East and Village Crest in the Senior East overlay area.

**Table 27**  
**Housing Unit Allocations, 2007 Allocation Year**

Planning Area	Possible Allocations		Allocations Granted <sup>1</sup>	Remaining Available
	2007	+ 20%		
Columbia	577	692	119	573
Elkridge	96	115	115	0
Ellicott City	308	370	332	38
Southeast <sup>2</sup>	176	211	293	(82)
Rural West	188	226	226	0
Senior East	255	306	306	0
Route 1	334	401	0	401
<b>TOTAL</b>	<b>1,934</b>	<b>2,321</b>	<b>1,391</b>	<b>930</b>

1. As of October 22, 2004

2. More allocations were given out than available in the Southeast in 2007 because previously phased projects were granted allocations prior to the adoption of the 2000 General Plan, which reduced future units. The rolling average provision in the APF Act will adjust future year allocations down over time to compensate.

**Table 28**  
**Granted Allocations for Future Years<sup>1</sup>**

Planning Area	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0
Elkridge	87	65	65	82	60	0	0	0	359
Ellicott City	165	167	40	0	0	94	0	0	466
Southeast	240	105	150	100	75	75	45	41	831
Rural West	32	0	0	0	0	0	0	0	32
Senior East	212	0	0	0	0	0	0	0	212
<b>TOTAL</b>	<b>736</b>	<b>337</b>	<b>255</b>	<b>182</b>	<b>135</b>	<b>169</b>	<b>45</b>	<b>41</b>	<b>1,900</b>

1. As of October 22, 2004

## Potential Population

Table 29 shows the most recent household size estimates by unit type from the 2000 Census. They are also used for purposes of this analysis.

**Table 29**  
**Household Size by Dwelling Unit Type**

Year	SFD	SFA	APT	MH
2000 Census Estimates	3.11	2.59	1.89	2.50

The development pipeline can be analyzed to project expected population growth from new development. As development progresses throughout the process, more exact population estimates based on dwelling unit type are possible. For this report, annual population growth has been estimated from potential housing units at three development stages: 1) recorded subdivisions, 2) issued building permits, and 3) issued use and occupancy permits. Table 30 summarizes the estimated population results from new growth for last year as well as the five year average.

**Table 30**  
**Comparison of Housing and Population Estimates**

Category	10/03 to 9/04		10/99 to 9/04 (Annual Ave.)	
	Housing Units	Population	Housing Units	Population
Recorded Lots	1,318	3,317	1,099	3,016
Building Permits	2,191	5,484	1,813	4,940
U & O Permits	1,522	4,022	1,854	5,146

Based on recorded lots last year from October 1, 2003 to September 30, 2004, there is potential for 3,317 new residents. This compares to a potential population of 5,484 based on the number of issued building permits and an estimated population of 4,022 based on use and occupancy permits issued during the same one year time period.

Over the five year period from October 1, 1999 to September 30, 2004, average annual population growth based on recorded lots is 3,016. Population growth based on the number of issued building permits and use and occupancy permits amounts to 4,940 and 5,146 per year, respectively. More detailed results for each development category are discussed in the sections below.

As indicated earlier in this report, not all potential units go through the subdivision process, so building permits and use & occupancy permits are a more accurate measure of population growth.

### Population Estimates from Recorded Subdivisions

Table 31 shows the potential population from recorded lots by unit type and by region for the 10/03 to 9/04 one year time period. Of the 3,317 potential new residents 37 percent will reside in single family detached units, 38 percent in single family attached units and 24 percent in apartment units. About 39 percent will live in Ellicott City, 37 percent in Elkridge, 15 percent in the Southeast, 9 percent in the Rural West. The remaining 1 percent will live in Columbia.

**Table 31**  
**Potential Population from Recorded Lots, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	34	0	0	0	34	1%
Elkridge	333	721	159	0	1,212	37%
Ellicott City	392	434	459	0	1,285	39%
Rural West	295	0	0	0	295	9%
Southeast	183	119	189	0	491	15%
<b>TOTAL</b>	<b>1,237</b>	<b>1,275</b>	<b>806</b>	<b>0</b>	<b>3,317</b>	<b>100%</b>
<b>PERCENT</b>	<b>37%</b>	<b>38%</b>	<b>24%</b>	<b>0%</b>	<b>100%</b>	

For the five years since October 1, 1999, there has been a potential of 5,494 residential units from recorded lots. This averages 1,099 new units per



year. Using the household size estimates discussed above for each unit type, an estimated 15,079 new residents could live in those units (Table 32). This results in an average population growth rate of about 3,016 new residents per year.

**Table 32**  
**Potential Population from Recorded Lots, 10/01/93 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	1,563	747	0	0	<b>2,310</b>
10/00 to 9/01	2,157	512	185	0	<b>2,853</b>
10/01 to 9/02	2,206	1,119	0	0	<b>3,326</b>
10/02 to 9/03	1,865	664	744	0	<b>3,273</b>
10/03 to 9/04	1,237	1,275	806	0	<b>3,317</b>
<b>TOTAL</b>	<b>9,027</b>	<b>4,317</b>	<b>1,735</b>	<b>0</b>	<b>15,079</b>
<b>PERCENT</b>	<b>60%</b>	<b>29%</b>	<b>12%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVE.</b>	<b>1,805</b>	<b>863</b>	<b>347</b>	<b>0</b>	<b>3,016</b>

Of the total 15,079 residents, 60 percent of the total population would reside in single family detached units. About 29 percent would live in single family attached units and 12 percent in apartment units.

## Population Estimates from Issued Building Permits

Building permits are generally a more timely and accurate indicator of potential population than recorded lots in subdivision plans. Table 33 shows the potential population from building permits by type and by region for the 10/03 to 9/04 one year time period. Of the 5,484 new residents 43 percent would reside in single family detached units, 28 percent in single family attached units and 29 percent in apartment units. About 27 percent are located in Ellicott City, 26 percent in the Southeast, 18 percent in the Rural West, 17 percent in Columbia and 12 percent in Elkrigde.

For the five years since October 1, 1999, 9,064 building permits for new residential units have been issued. This averages 1,813 permits per year. Using the household size estimates discussed earlier for each unit type, an

**Table 33**  
**Potential Population from Building Permits, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	90	160	674	0	924	17%
Elkrigde	298	217	151	0	666	12%
Ellicott City	416	321	742	0	1,479	27%
Rural West	827	165	0	0	992	18%
Southeast	743	680	0	0	1,423	26%
<b>TOTAL</b>	<b>2,374</b>	<b>1,543</b>	<b>1,567</b>	<b>0</b>	<b>5,484</b>	<b>100%</b>
<b>PERCENT</b>	<b>43%</b>	<b>28%</b>	<b>29%</b>	<b>0%</b>	<b>100%</b>	

estimated 24,702 new residents would live in those units (Tables 34).

Of the total 24,702 residents, 65 percent of the total population would reside in single family detached units. About 20 percent would live in single family attached units and 16 percent in apartments.

**Table 34**  
**Potential Population from Building Permits, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	4,428	884	1,229	0	<b>6,541</b>
10/00 to 9/01	3,598	827	238	0	<b>4,664</b>
10/01 to 9/02	3,250	990	402	0	<b>4,643</b>
10/02 to 9/03	2,328	646	396	0	<b>3,370</b>
10/03 to 9/04	2,374	1,543	1,567	0	<b>5,484</b>
<b>TOTAL</b>	<b>15,979</b>	<b>4,891</b>	<b>3,832</b>	<b>0</b>	<b>24,702</b>
<b>PERCENT</b>	<b>65%</b>	<b>20%</b>	<b>16%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVE.</b>	<b>3,196</b>	<b>978</b>	<b>766</b>	<b>0</b>	<b>4,940</b>

## Population Estimated from Use and Occupancy Permits

Use and occupancy permits are the most accurate and immediate predictor of new population. A use and occupancy permit is issued upon completion of a residential unit and is required prior to residents moving in.

Table 35 shows the potential population from use and occupancy permits by type and by region for the 10/03 to 9/04 one year time period. Of the estimated 4,022 new residents 55 percent live in single family detached units, 26 percent in single family attached units and 19 percent in apartment units. About 27 percent live in the Southeast, 23 percent each in the Rural West and Ellicott City, 16 percent in Columbia and 11 percent in Elkridge.

For the five years since October 1, 1999, there have been 9,268 use and occupancy permits issued. This averages 1,854 per year. Using the household size estimate discussed above, an estimated 25,730 new residents could live in those units (Table 36).

Of the total 25,730 new residents, about 69 percent of the total would reside in single family detached units. About 18 percent would live in single family attached units and 13 percent in apartments.

**Table 35**  
**Potential Population from Use & Occupancy Permits, 10/01/03 to 9/30/04**

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	103	160	387	0	650	16%
Elkridge	280	90	68	0	438	11%
Ellicott City	404	220	317	0	941	23%
Rural West	839	67	0	0	906	23%
Southeast	590	496	0	0	1,087	27%
<b>TOTAL</b>	<b>2,216</b>	<b>1,034</b>	<b>772</b>	<b>0</b>	<b>4,022</b>	<b>100%</b>
<b>PERCENT</b>	<b>55%</b>	<b>26%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>	

**Table 36**  
**Potential Population from Use & Occupancy Permits, 10/01/99 to 9/30/04**

Year	SFD	SFA	APT	MH	Total
10/99 to 9/00	5,308	1,099	681	0	<b>7,088</b>
10/00 to 9/01	4,183	980	338	0	<b>5,500</b>
10/01 to 9/02	3,142	949	1,082	0	<b>5,172</b>
10/02 to 9/03	2,921	608	419	0	<b>3,948</b>
10/03 to 9/04	2,216	1,034	772	0	<b>4,022</b>
<b>TOTAL</b>	<b>17,769</b>	<b>4,669</b>	<b>3,292</b>	<b>0</b>	<b>25,730</b>
<b>PERCENT</b>	<b>69%</b>	<b>18%</b>	<b>13%</b>	<b>0%</b>	<b>100%</b>
<b>5 YEAR AVE.</b>	<b>3,554</b>	<b>934</b>	<b>658</b>	<b>0</b>	<b>5,146</b>

# Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from October 1, 2003 to September 30, 2004 have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 37). The data is graphically represented in Charts 18, 19, and 20.

The cost of housing in Howard County has been increasing steadily and dramatically, from a mean sales price of \$226,390 in 98/99 to \$345,720 last

year for all housing types combined. This is an overall increase of 52.7 percent over the four year time period and an average annual increase of about 11.2 percent.

Single family detached homes have appreciated the most in terms of dollar increase, with the mean price rising by about \$176,000 from \$291,510 four years ago to \$467,352 last year, a 60 percent increase. About 40 percent of this increase has occurred in the last year alone and two-thirds of the increase has occurred in the last two years.

Single family attached units have increased at an even fastest pace with a 73.1 percent increase in the mean sales price over the four year time period.

**Table 37**  
**Housing Sales by Type, 10/01/99 to 9/30/04**

10/99 to 9/00			
Unit Type	# of Sales	Mean	Median
Condo	432	\$100,702	\$89,900
MH	1	\$79,900	\$79,900
SFA	1,758	\$145,863	\$139,900
SFD	3,010	\$291,510	\$276,418
<b>TOTAL</b>	<b>5,201</b>	<b>\$226,390</b>	

10/01 to 9/02			
Unit Type	# of Sales	Mean	Median
Condo	742	\$112,671	\$100,000
MH	5	\$57,879	\$63,000
SFA	2,355	\$183,382	\$176,500
SFD	3,146	\$348,344	\$325,000
<b>TOTAL</b>	<b>6,248</b>	<b>\$257,946</b>	

10/03 to 9/04			
Unit Type	# of Sales	Mean	Median
Condo	1,009	\$190,140	\$170,000
MH	6	\$108,717	\$96,000
SFA	2,339	\$252,498	\$240,100
SFD	3,095	\$467,352	\$435,000
<b>TOTAL</b>	<b>6,449</b>	<b>\$345,720</b>	

10/00 to 9/01			
Unit Type	# of Sales	Mean	Median
Condo	576	\$103,835	\$89,900
MH	7	\$90,629	\$88,500
SFA	2,006	\$161,115	\$155,000
SFD	2,889	\$315,499	\$294,990
<b>TOTAL</b>	<b>5,478</b>	<b>\$236,421</b>	

10/02 to 9/03			
Unit Type	# of Sales	Mean	Median
Condo	792	\$137,905	\$129,000
MH	5	\$83,860	\$88,900
SFA	1,943	\$203,347	\$195,000
SFD	3,019	\$396,678	\$373,650
<b>TOTAL</b>	<b>5,759</b>	<b>\$295,592</b>	

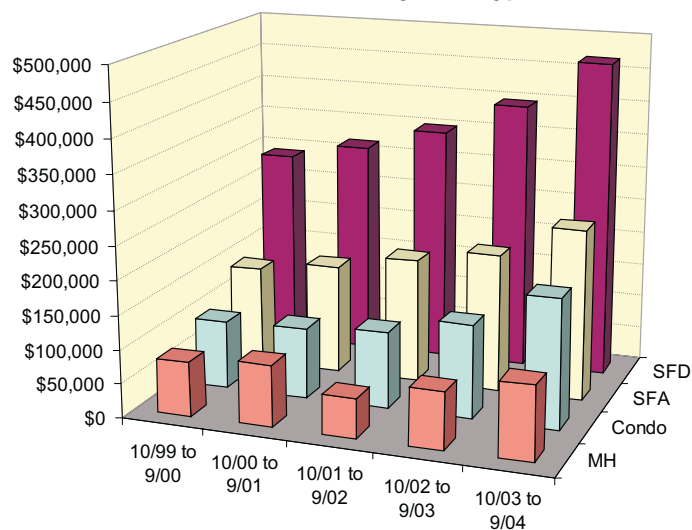
Almost two-thirds of this increase has occurred over the last two years. The price of condominiums has increased by an even faster rate of 88.8 percent over the four years. Almost 60 percent of this increase occurred just last year and about 87 percent over the last two years alone.

During this period the number of annual sales have also increased from 5,201 sales in 99/00 to 6,449 sales in 03/04. These data reflect both new and existing units combined.

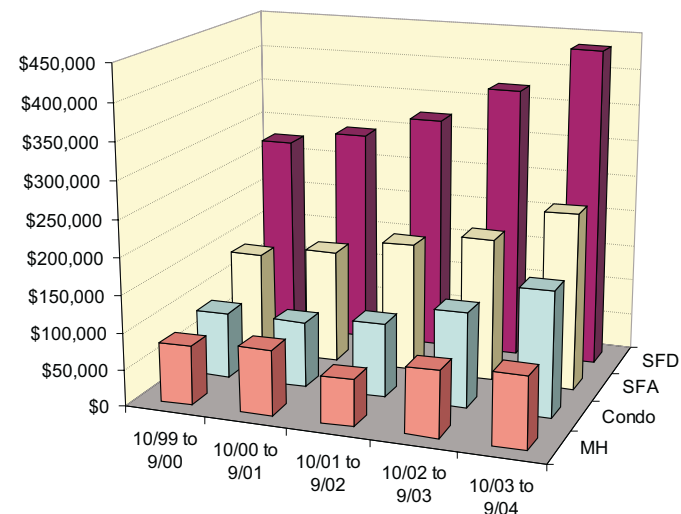
Nationally and regionally, the housing market has been strong over the last several years. Howard County is no exception. For Howard County in particular, it has been indicated by local builders and real estate agents that recent demand has exceeded supply, which has significantly contributed to the price increases. Low mortgage rates have also contributed.

Map 14 shows the housing sales by zip code in the County. Both the number of sales and the mean sales prices are shown.

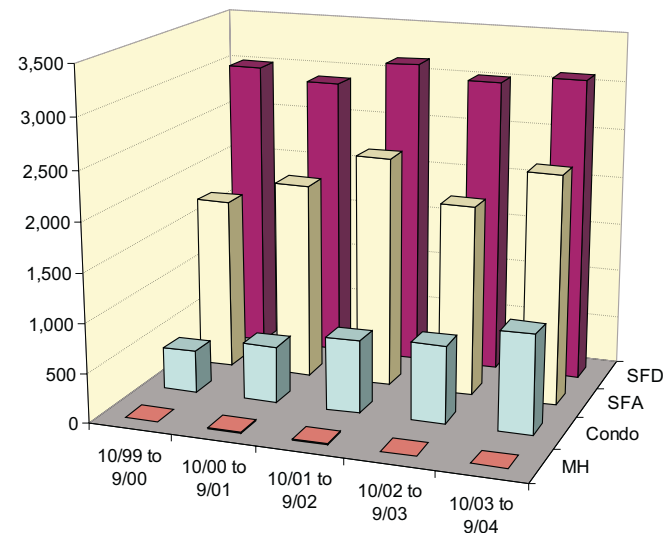
**Chart 18**  
Mean Sales Price by Unit Type



**Chart 19**  
Median Sales Price by Unit Type



**Chart 20**  
Number of Sales by Unit Type





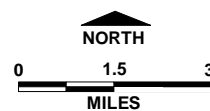
# Development Monitoring System Report

Zipcode  
Mean Home Price  
# of Sales

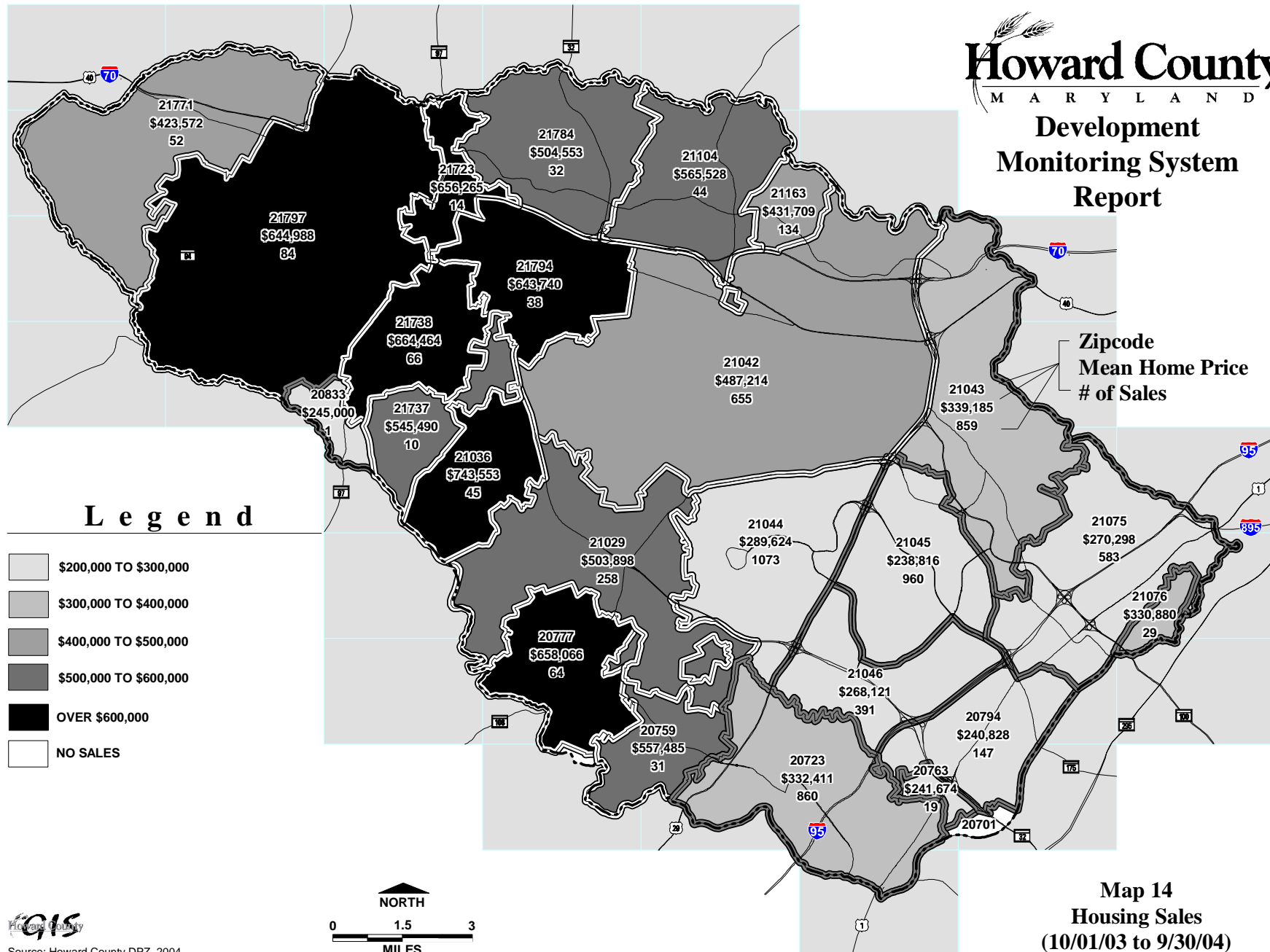
## Legend



Source: Howard County DPZ, 2004.



Map 14  
Housing Sales  
(10/01/03 to 9/30/04)



# Rural Land Preservation

## Agricultural Land Preservation Program

Howard County's Agricultural Land Preservation Program (ALPP) has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the purchase of easements where a farmer can voluntarily choose to sell a perpetual easement to the County while holding a fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

Agricultural land preservation in the County first began in 1979 using the State's easement purchase program, known as the Maryland Agricultural Land Preservation Foundation (MALPF). The County instituted its own easement purchase program, indicated above, in 1984 and until 1988 both the State and County programs were active in preserving farmland. In 1989 the County initiated the innovative Installment Purchase Agreement (IPA) program to purchase easements and local interest in the State program ended. Landowner interest in the State program was renewed in recent years based on changes to the MALPF valuation formula and purchase options. Last year, the State Board of Public Works approved 2 easement purchases on 44 acres at a price of \$15,000 per acre.

The County's IPA program reached its \$55 million authorization limit in Fiscal Year 1997 and the program was temporarily suspended until Spring 2000 when the County Council authorized an additional \$15 million in IPA commitments. Following this, in June 2001, the County purchased easements on 400.5 acres at a price of \$2.48 million.

In November 2003, the maximum purchase price for land to join the IPA program increased from \$7,200 to \$20,000 per acre. The goal of this authorized spending level increase was to make the IPA program more competitive given the increasing land prices in the Rural West. To date, no new acreage has been acquired since the spending increase was put into effect.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process, either as the dedi-

cation of sending parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

During the latest one year reporting period, an additional 201 acres of agricultural preservation parcels were created in subdivisions through the development process and were enrolled in the Agricultural Land Preservation Program.

As of September 30, 2004, there were 19,277 acres of permanently preserved agricultural land. This includes 13,309 acres of purchased easements through the County's PDR Program, 3,954 acres of purchased easements by the State and 2,014 preservation acres dedicated as part of the development process (Table 38).

**Table 38**  
**Agricultural Preservation Easements, September 30, 2004**

Type	Acres	Percent
County Purchased Agric. Easements	13,309	69%
State Purchased Agric. Easements	3,954	21%
Dedicated Agric. Preservation Parcels	2,014	10%
<b>TOTAL</b>	<b>19,277</b>	<b>100%</b>

## Rural Easement Dedication

As previously indicated, last year 201 acres of agricultural preservation parcels were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 2,014 acres.

Besides agricultural easements, there are additional ways parcels are preserved through the development process. Last year, 190 acres of land in 22 parcels were dedicated as joint Howard County/Homeowner's Association



preservation parcels and another 21 acres in one parcel were dedicated as a joint Howard County Conservancy/Howard County preservation parcel. Table 39 shows the land preservation totals from dedicated easements to date for all easement types.

Since 1992, preservation easements on 6,647 acres have been created by cluster development and the Density/Cluster Exchange Options. Including open space, the total comes to 7,028 acres.

The majority of the total dedicated preservation easements, 4,042 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 2,014 acres are held by the Howard County Agricultural Land Preservation Program. About 461 acres are jointly held by the Howard County Conservancy and Howard County. The remaining 130 acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society.

Table 39 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 9,823 acres have been subdivided using these zoning options in the Rural West. About 29 percent of this total, or 2,795 acres, is used for the development of residential lots and road right of ways. The remaining 71 percent, or 7,028 acres, is land in dedicated preservation easements and open space as described earlier. Of the 2,795 acres for residential development, about 428 acres are yet undeveloped, 2,112 acres are developed and 255 acres are for roads.

Preservation easements in the Rural West discussed above total 23,910 acres. This includes all 19,277 acres of agricultural preservation easements and 4,633 acres of other preservation parcels dedicated through the subdivision process. This represents about 25 percent of the approximate 94,660 total acres of land in the Rural West.

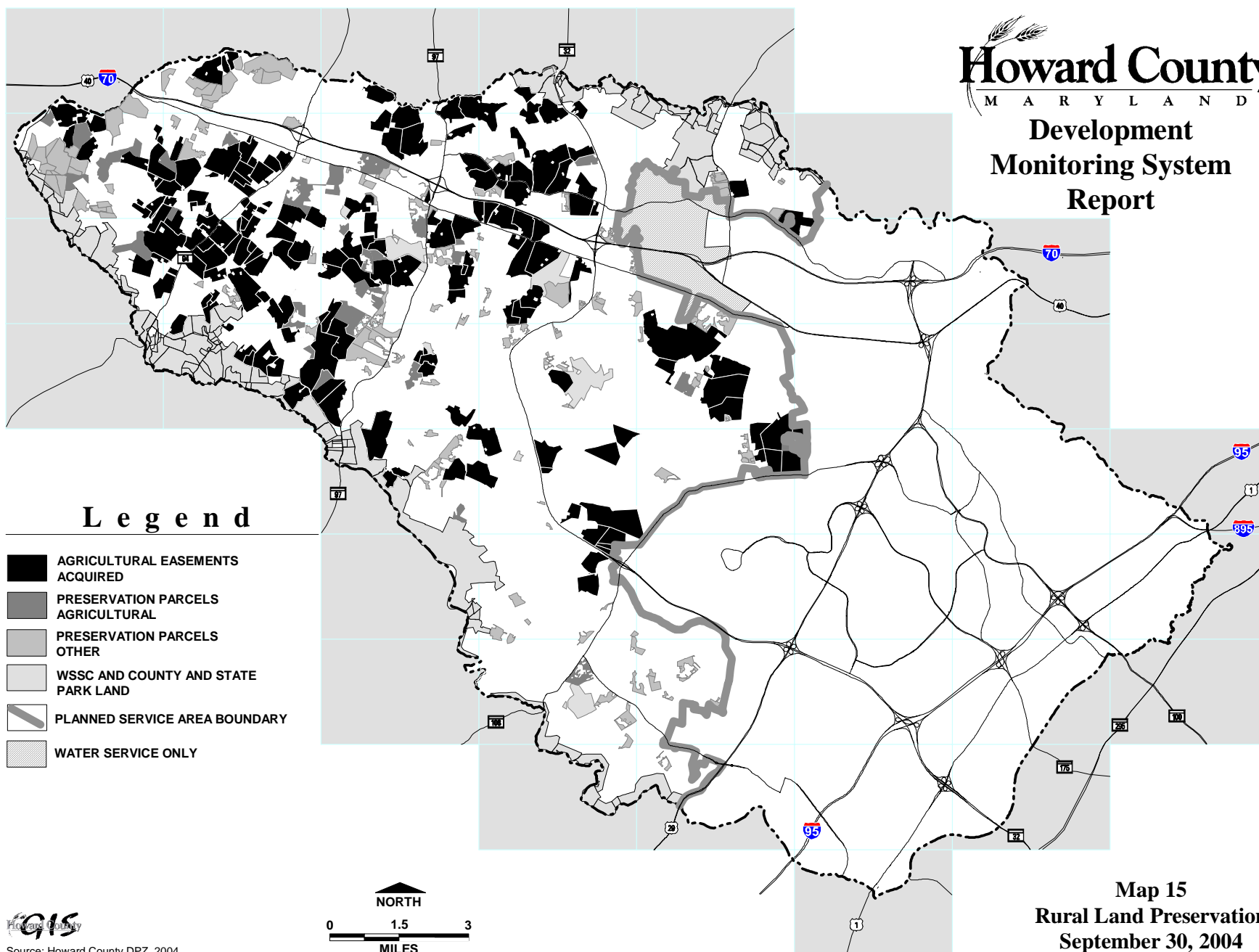
Map 15 shows the preserved land in Howard County as of September 30, 2004 including acquired (purchased) agricultural easements and dedicated agricultural and other preserved parcels.

**Table 39**  
**Rural Land Preservation Through Dedicated Easements**

<b>Residential Unit Cluster Development</b>	<b>Lots</b>	<b>Acres</b>	
Undeveloped Lots (By Right)	215	278	
Undeveloped Lots (From Density Transfer)	138	150	
<b>Total Undeveloped Lots</b>	<b>353</b>	<b>428</b>	
Developed Lots (By Right)	1,294	1,500	
Developed Lots (From Density Transfer)	580	612	
<b>Total Developed Lots</b>	<b>1,874</b>	<b>2,112</b>	
Roadway		255	
<b>TOTAL</b>	<b>2,227</b>	<b>2,795</b>	<b>28.5%</b>
<b>Open Space and Preservation</b>	<b>Lots</b>	<b>Acres</b>	
Agricultural Preservation	53	2,014	
Howard County/Homeowner's Association	271	4,042	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	21	461	
<b>Total Preservation</b>	<b>350</b>	<b>6,647</b>	
Open Space (Dedicated to County)	11	62	
Open Space (Not Dedicated to County)	70	319	
<b>Total Open Space</b>	<b>81</b>	<b>381</b>	
<b>TOTAL</b>	<b>431</b>	<b>7,028</b>	<b>71.5%</b>
<b>GRAND TOTAL (Includes Res. Develop.)</b>	<b>2,658</b>	<b>9,823</b>	<b>100.0%</b>

## Total Preserved Land in the Rural West

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 34,661 acres, about 36 percent of all land in the Rural West.







# Non-Residential Development

## Recorded Non-Residential Subdivisions

For this report, non-residential development is tabulated within four regions as shown on Map 16. The number of non-residential *plans* recorded, the number of non-residential *lots* created, and the *acreage* of plans recorded have been compiled for each of these regions and are discussed below. The analysis includes last year's subdivision activity as well as activity for the previous four years.

### Summary of Last Year's Results

Last year there were 25 non-residential lots recorded countywide in 27 subdivision plans totaling 461 acres (Table 40). The West had the most lots with 11, or 44 percent of the total. The I-95 Corridor had 32 percent of the total with 8 recorded lots. Columbia had 6 recorded lots last year, and Ellicott City had no recorded lots. Note that these lots only include net new lots created and do not include lots in resubdivisions, for example, that add easements or clarify lot lines. Of the 27 subdivision plans recorded last year, 9 each were in the I-95 Corridor and Columbia, followed by 7 in the West and 2 in Ellicott City.

Of the total 461 acres of non-residential land recorded, 204 acres, or 44 percent, were in Columbia. A total of 154 acres were recorded in the I-95 Corridor (33 percent). In the West and Ellicott City there were 95 and 8 recorded acres last year, respectively, representing 21 and 2 percent of the total for each. These include all acres including recordations for the purpose of adjusting lines, adding easements, etc.

Table 41 shows the number of recorded lots by development type. Of the 25 lots recorded last year, 14 were for commercial uses (which includes retail and office space), 8 for industrial uses, and 3 were for other uses such as open space and roadway parcels. There were no governmental and institutional lots recorded. Most of the new commercial lots were in the West and Columbia, whereas all of the industrial lots were in the I-95 Corridor and the West.

**Table 40**  
**Recorded Non-Residential Subdivisions, 10/01/03 to 9/30/04**

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	6	24%	9	33%	204	44%
Ellicott City	0	0%	2	7%	8	2%
I-95 Corridor	8	32%	9	33%	154	33%
West	11	44%	7	26%	95	21%
<b>TOTAL</b>	<b>25</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>461</b>	<b>100%</b>

## Last Year's Projects - Greater than 30 Acres

Of the total 461 non-residential acres recorded last year, 305 acres, about 66 percent of the total, were in subdivisions that were more than 30 acres in size. These larger subdivisions are shown in Table 42. The location of these plans are shown on Map 16.

Columbia includes 3 of these larger subdivisions totaling 159 acres. The I-95 Corridor includes two plans totaling 112 acres, followed by the West with one 34 acre plan.

## Five Year Results

Table 43 shows the recorded non-residential subdivisions for the last five years from October 1, 1999 to September 30, 2004. Over this five year period there were 367 non-residential lots recorded countywide in 206 subdivision plans totaling 4,623 acres. This equates to a five year average of 925 recorded acres per year. Over the five year period, 36 percent of the acreage was in the I-95 Corridor, 33 percent in Columbia, 26 percent in the West, and 6 percent in Ellicott City.

Table 44 shows the total non-residential acreage recorded by year for each of the last five years. There was substantially less recorded acreage last year compared to each of the previous 4 years. Last year there were only 461 acres recorded compared to 1,042 acres in 2003/2004. Chart 21 shows these results graphically by region. It is apparent that the I-95 Corridor and Columbia has had the most activity over the five year period with more

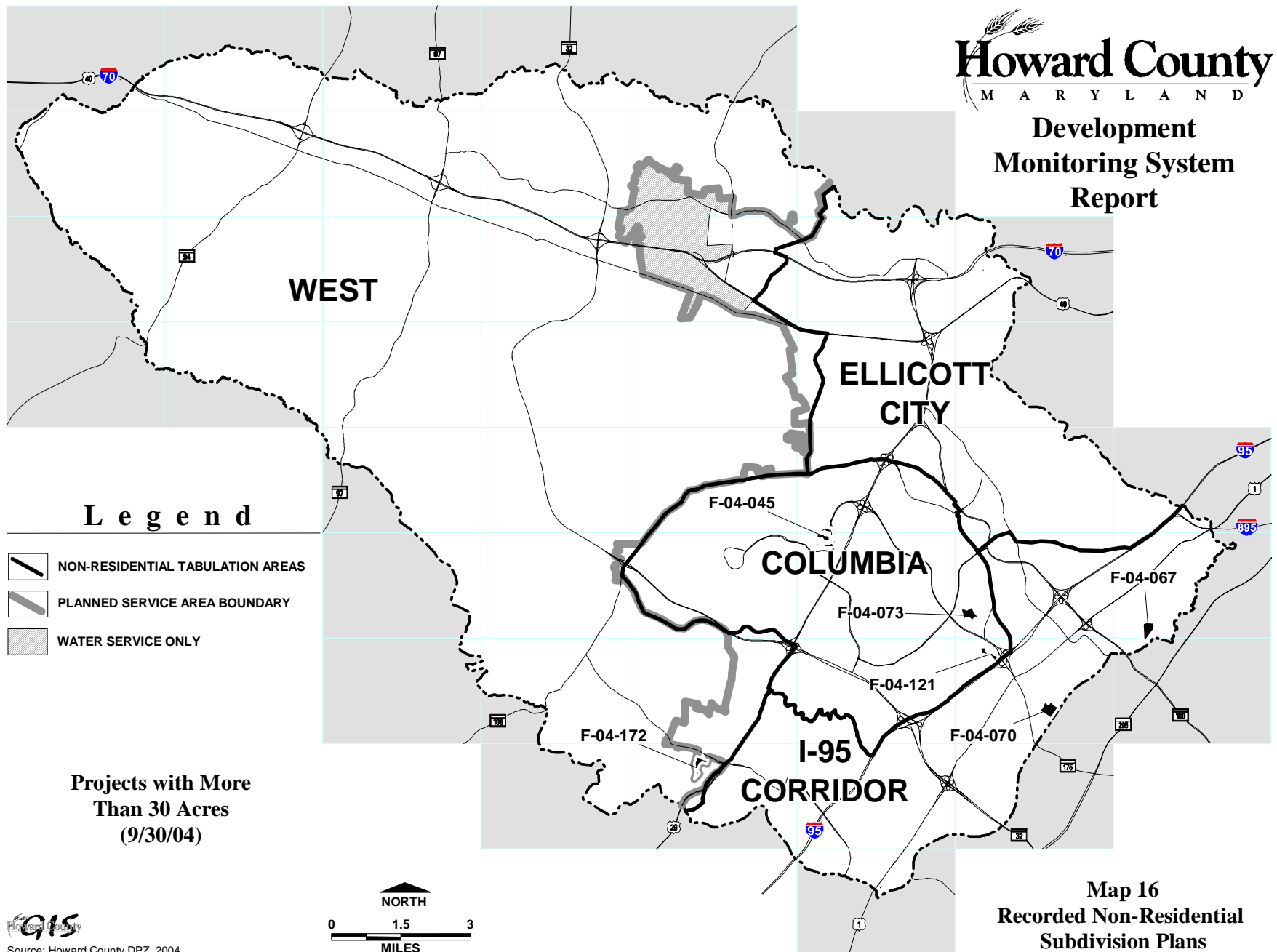
**Table 41**  
**Recorded Lots by Development Type, 10/01/03 to 9/30/04**

Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL
Columbia	6	0	0	0	6
Ellicott City	0	0	0	0	0
I-95 Corridor	1	5	0	2	8
West	7	3	0	1	11
<b>TOTAL</b>	<b>14</b>	<b>8</b>	<b>0</b>	<b>3</b>	<b>25</b>
<b>PERCENT</b>	<b>56%</b>	<b>32%</b>	<b>0%</b>	<b>12%</b>	<b>100%</b>

1. Includes open space and non-buildable parcel.

**Table 42**  
**Recorded Non-Residential Subdivision Plans, Plans With More Than 30 Acres, 10/01/03 to 9/30/04**

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-04-045	Town Center	Commercial	68	<b>159</b>
	F-04-073	Snowden River Business Park	Commercial	59	
	F-04-121	Columbia Gateway	Industrial	32	
I-95 Corridor	F-04-067	Patapsco Valley Business Center	Industrial	50	<b>112</b>
	F-04-070	Dorsey Run Industrial Center	Industrial	62	
West	F-04-172	Grace Community Church	Govt & Inst.	34	<b>34</b>
<b>TOTAL</b>					<b>305</b>



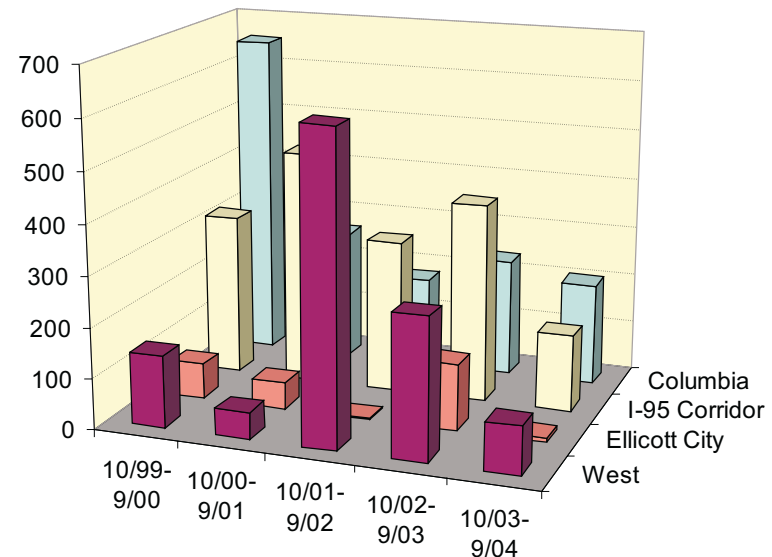
**Table 43**  
**Recorded Non-Residential Subdivisions, 10/01/99 to 9/30/04**

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	145	40%	70	34%	1,533	33%
Ellicott City	25	7%	18	9%	266	6%
I-95 Corridor	139	38%	74	36%	1,644	36%
West	58	16%	44	21%	1,180	26%
<b>TOTAL</b>	<b>367</b>	<b>100%</b>	<b>206</b>	<b>100%</b>	<b>4,623</b>	<b>100%</b>
<b>5 YEAR AVG.</b>	<b>73</b>		<b>41</b>		<b>925</b>	

than 36 and 33 percent of the countywide total, respectively. It should be again noted that the recorded acreage includes resubdivisions and subdivisions to add easements and does not therefore reflect net new recorded non-residential acreage.

Table 45 summarizes the number of lots by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, commercial and industrial lots comprised about 37 and 34 percent of the total 367 recorded lots, respectively. This is followed by other lots at 24 percent of the total. (Other lots include uses such as roadways, non-buildable parcels and roadways.) Government and institutional lots consisted of the remaining 5 percent of the five year total.

**Chart 21**  
**Recorded Non-Residential Acres**



**Table 44**  
**Recorded Non-Residential Acreage, 10/01/99 to 9/30/04**

Region	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	10/03-9/04	TOTAL	PERCENT
Columbia	653	261	179	236	204	1,533	33%
Ellicott City	71	53	2	132	8	266	6%
I-95 Corridor	323	468	304	395	154	1,644	36%
West	143	53	610	279	95	1,180	26%
<b>TOTAL</b>	<b>1,190</b>	<b>835</b>	<b>1,095</b>	<b>1,042</b>	<b>461</b>	<b>4,623</b>	<b>100%</b>

**Table 45**  
**Number of Non-Residential Recorded Lots by Development Type, 10/01/93 to 9/30/04**

10/99 to 9/00					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL
Columbia	17	21	1	20	59
Ellicott City	15	0	1	0	16
I-95 Corridor	2	22	1	4	29
West	5	7	1	8	21
<b>TOTAL</b>	<b>39</b>	<b>50</b>	<b>4</b>	<b>32</b>	<b>125</b>
<b>PERCENT</b>	<b>31%</b>	<b>40%</b>	<b>3%</b>	<b>26%</b>	<b>100%</b>

10/01 to 9/02					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL
Columbia	11	3	2	5	21
Ellicott City	0	0	0	0	0
I-95 Corridor	4	2	1	6	13
West	3	4	0	1	8
<b>TOTAL</b>	<b>18</b>	<b>9</b>	<b>3</b>	<b>12</b>	<b>42</b>
<b>PERCENT</b>	<b>43%</b>	<b>21%</b>	<b>7%</b>	<b>29%</b>	<b>100%</b>

10/03 to 9/04					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL
Columbia	6	0	0	0	6
Ellicott City	0	0	0	0	0
I-95 Corridor	1	5	0	2	8
West	7	3	0	1	11
<b>TOTAL</b>	<b>14</b>	<b>8</b>	<b>0</b>	<b>3</b>	<b>25</b>
<b>PERCENT</b>	<b>56%</b>	<b>32%</b>	<b>0%</b>	<b>12%</b>	<b>100%</b>

10/00 to 9/01					
Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
12	13	3	8	36	
0	0	3	1	4	
1	32	1	6	40	
3	5	1	0	9	
<b>16</b>	<b>50</b>	<b>8</b>	<b>15</b>	<b>89</b>	
<b>18%</b>	<b>56%</b>	<b>9%</b>	<b>17%</b>	<b>100%</b>	

10/02 to 9/03					
Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
17	0	0	6	23	
2	0	3	0	5	
23	7	0	19	49	
6	0	1	2	9	
<b>48</b>	<b>7</b>	<b>4</b>	<b>27</b>	<b>86</b>	
<b>56%</b>	<b>8%</b>	<b>5%</b>	<b>31%</b>	<b>100%</b>	

TOTAL 10/99 to 9/04					
Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
63	37	6	39	145	
17	0	7	1	25	
31	68	3	37	139	
24	19	3	12	58	
<b>135</b>	<b>124</b>	<b>19</b>	<b>89</b>	<b>367</b>	
<b>37%</b>	<b>34%</b>	<b>5%</b>	<b>24%</b>	<b>100%</b>	

1. Includes uses such as roadway, non-buildable parcels & open space.

# In-Process Non-Residential Subdivisions

This section summarizes non-residential subdivisions in process. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential lots and acreage currently being processed as of September 30, 2004 are tabulated and compared with those in process a year earlier (as of September 30, 2003).

## Number of Plans

Countywide, there were 27 non-residential plans in process as of September 30, 2004, which is more than last year when there were 18 plans in process (Table 46). Nine plans each were in the I-95 Corridor and the West, 7 plans in Columbia and only 2 in Ellicott City.

For both years most of the plans were in the Final Plan stage. This is primarily due to the relatively high number of resubdivisions which only come in at the Final Plan stage.

## Number of Lots

Table 47 shows the number of potential non-residential lots in process. As of September 30, 2004, there were 55 lots in process, more than the 36 in process on September 30, 2003.

The West had 20 lots in process in 2004. The I-95 Corridor had 17 lots in process, Columbia had 10 and Ellicott City had 8. Table 50 shows a more detailed breakdown of the number of non-residential lots in process by development type for this most recent year and for one year earlier.

**Table 46**  
**Number of Non-Residential Plans in Process, 09/30/03 and 09/30/04**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Columbia	1	1	0	0	0	0	2	6	3	7
Ellicott City	0	1	0	0	0	0	1	1	1	2
I-95 Corridor	1	3	0	0	0	0	7	6	8	9
West	1	0	1	2	0	1	4	6	6	9
<b>TOTAL</b>	<b>3</b>	<b>5</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>14</b>	<b>19</b>	<b>18</b>	<b>27</b>

**Table 47**  
**Number of Potential Non-Residential Lots from Subdivision Plans in Process, 09/30/03 and 09/30/04**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL LOTS	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Columbia	5	5	0	0	0	0	5	5	10	10
Ellicott City	0	3	0	0	0	0	0	5	0	8
I-95 Corridor	1	4	0	0	0	0	12	13	13	17
West	1	0	1	3	0	1	11	16	13	20
<b>TOTAL</b>	<b>7</b>	<b>12</b>	<b>1</b>	<b>3</b>	<b>0</b>	<b>1</b>	<b>28</b>	<b>39</b>	<b>36</b>	<b>55</b>

## Number of Acres

There were a total of 1,111 non-residential acres in the subdivision process as of September 30, 2004 (Table 48). This compares to 484 acres in process one year earlier. For the current year most of the acreage is in the West (569 acres). This is followed by Columbia with 349 acres, the I-95 Corridor with 162 acres and Ellicott City with 31 acres. Note that these plans include resubdivisions as well as subdivisions that do not necessarily create new lots but just add or revise easements, etc.

with 116 acres as part of the Benson East development and 71 acres in the Snowden River Business Park. In the I-95 Corridor, the Blue Stream Corporate Center has 76 acres in the subdivision process. In the West, there are 3 large plans in process: a 361 acre revision plat for Johns Hopkins APL (to revise forest conservation easements), a 101 acre plan in Waverly Woods and a 68 plan in Turf Valley. Map 17 shows the locations of these projects.

## Major Projects

Of the 1,111 acres of non-residential land in process, 911 acres (about 82 percent) are for projects greater than 50 acres (Table 49). These include 118 acres in Columbia gateway in a plan that consolidates parcels, a plan

**Table 48**  
**Acreage of Non-Residential Subdivision Plans in Process, 09/30/03 and 09/30/04**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Columbia	116	116	0	0	0	0	72	233	188	349
Ellicott City	0	10	0	0	0	0	6	21	6	31
I-95 Corridor	59	13	0	0	0	0	105	149	164	162
West	25	0	0	29	26	3	75	537	126	569
<b>TOTAL</b>	<b>200</b>	<b>139</b>	<b>0</b>	<b>29</b>	<b>26</b>	<b>3</b>	<b>258</b>	<b>940</b>	<b>484</b>	<b>1,111</b>

**Table 49**  
**In-Process Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 09/30/04**

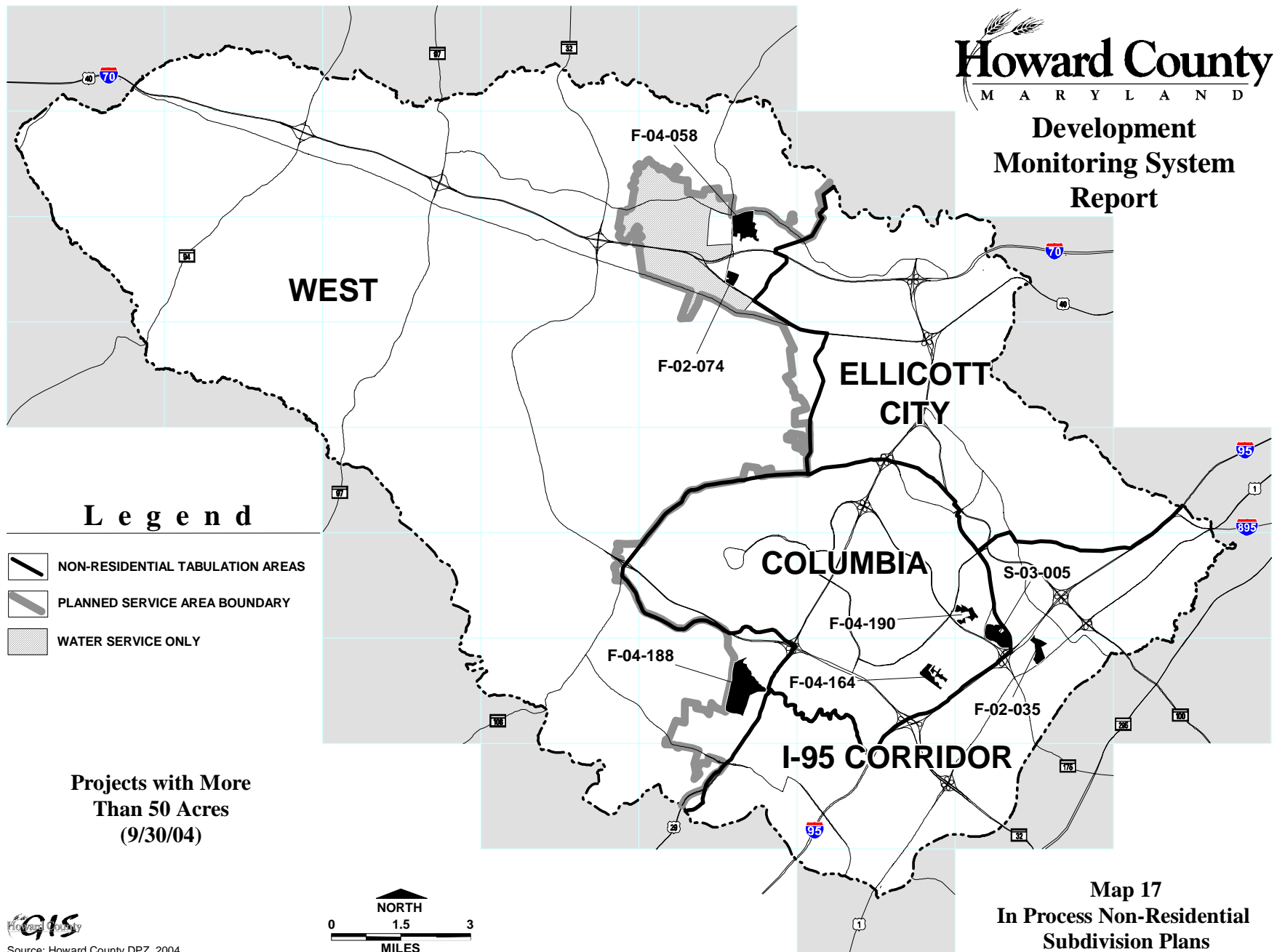
Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-04-164	Columbia Gateway	Industrial	118	<b>305</b>
	S-03-005	Benson East	Commercial	116	
	F-04-190	Snowden River Business Park	Commercial	71	
I-95 Corridor	F-02-035	Blue Stream Corporate Center	Industrial	76	<b>76</b>
West	F-04-188	Johns Hopkins University-APL	Commercial	361	<b>530</b>
	F-04-058	GTW's Waverly Woods	Commercial	101	
	F-02-074	Turf Valley Professional Buildings	Commercial	68	
<b>TOTAL</b>					<b>911</b>



**Table 50**  
**Number of Potential Lots From Non-Residential Subdivision Plans in Process by Development Type, 09/30/03 and 09/30/04**

09/30/04 ==> Sketch						Preliminary Equivalent Sketch					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
Columbia	5	0	0	0	5	0	0	0	0	0	
Ellicott City	3	0	0	0	3	0	0	0	0	0	
I-95 Corridor	4	0	0	0	4	0	0	0	0	0	
West	0	0	0	0	0	1	0	1	1	3	
<b>TOTAL</b>	<b>12</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>12</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>3</b>	
09/30/04 ==> Preliminary						Final					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
Columbia	0	0	0	0	0	2	1	0	2	5	
Ellicott City	0	0	0	0	0	0	0	1	4	5	
I-95 Corridor	0	0	0	0	0	1	12	0	0	13	
West	0	0	0	1	1	9	0	2	5	16	
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>12</b>	<b>13</b>	<b>3</b>	<b>11</b>	<b>39</b>	
09/30/03 ==> Sketch						Preliminary Equivalent Sketch					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
Columbia	5	0	0	0	5	0	0	0	0	0	
Ellicott City	0	0	0	0	0	0	0	0	0	0	
I-95 Corridor	1	0	0	0	1	0	0	0	0	0	
West	1	0	0	0	1	0	0	1	0	1	
<b>TOTAL</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	
09/30/03 ==> Preliminary						Final					
Region	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
Columbia	0	0	0	0	0	5	0	0	0	5	
Ellicott City	0	0	0	0	0	0	0	0	0	0	
I-95 Corridor	0	0	0	0	0	0	10	0	2	12	
West	0	0	0	0	0	2	4	3	2	11	
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>14</b>	<b>3</b>	<b>4</b>	<b>28</b>	
TOTAL - 09/30/04						TOTAL - 09/30/03					
Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL		Com.	Ind.	Gov./Inst.	Other <sup>1</sup>	TOTAL	
7	1	0	2	10		10	0	0	0	10	
3	0	1	4	8		0	0	0	0	0	
5	12	0	0	17		1	10	0	2	13	
10	0	3	7	20		3	4	4	2	13	
<b>25</b>	<b>13</b>	<b>4</b>	<b>13</b>	<b>55</b>		<b>14</b>	<b>14</b>	<b>4</b>	<b>4</b>	<b>36</b>	

1. Includes access easements, open space, stormwater management, and roadway.



## Approved Non-Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by four regions. The number of non-residential site development *plans* approved, the number of *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below.

Additionally, the square footage of floor space in approved site development plans is compiled. This is useful to estimate employment, which is discussed later in this report (Page 78). The analysis includes last year's site development plan activity as well as activity for the last five years.

### Summary of Last Year's Results

Last year there were 72 non-residential lots approved countywide in 69 site development plans totaling about 1,602 acres (Table 51). The West had 32 lots approved, the I-95 Corridor had 18, Columbia had 15 and Ellicott City had 7. Of the 69 site development plans approved last year, 29 were in the West, 18 were in the I-95 Corridor, 13 were in Columbia and 9 were in Ellicott City.

Of the total 1,602 acres of non-residential land approved in site development plans, 1,037 acres, or 65 percent, were in the West. A total of 467 acres were approved in the I-95 Corridor (29 percent). In Ellicott City

Table 51 Approved Non-Residential Site Development Plans, 10/01/03 to 9/30/04						
Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	15	21%	13	19%	76	5%
Ellicott City	7	10%	9	13%	22	1%
I-95 Corridor	18	25%	18	26%	467	29%
West	32	44%	29	42%	1,037	65%
<b>TOTAL</b>	<b>72</b>	<b>100%</b>	<b>69</b>	<b>100%</b>	<b>1,602</b>	<b>100%</b>

there were 22 approved acres last year representing only 1 percent of the total. There were 76 acres approved in the Columbia, 5 percent of the total.

Table 52 shows the number of approved lots by development type. Of the 72 lots recorded last year, 22 are for office/service uses, 11 for government and institutional uses, 9 for retail uses and 4 for manufacturing/extensive industrial uses. There were also 26 other lots approved for mass grading, paved surfaces and other uses.

Table 52 Number of Lots in Approved Site Development Plans, 10/01/03 to 9/30/04						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	1	3	0	2	9	15
Ellicott City	0	3	0	0	4	7
I-95 Corridor	3	8	4	0	3	18
West	5	8	0	9	10	32
<b>TOTAL</b>	<b>9</b>	<b>22</b>	<b>4</b>	<b>11</b>	<b>26</b>	<b>72</b>

1. Includes tot lots, stream resoration, parking lots, open space, stormwater management, pathways, community rooms, communication towers, mass grading, and storm water management pond.

Table 53 shows the square footage of building space in last year's approved site development plans by type of use. Countywide, there was almost 1.5 million square feet of building space approved. About 52 percent of this total, 783,000 square feet, was in the West. About 413,000 square feet was in the I-95 Corridor (28 percent). Ellicott City had about 150,000 square feet approved (10 percent), followed by Columbia with about 145,000 square feet (10 percent).

Almost 42 percent of the total building space is for office/service uses totaling 624,000 square feet. This is followed by government & institutional uses with almost 515,000 square feet of approved building space (35 percent). About 157,000 square feet are for manufacturing/industrial uses

(11 percent), and about 136,000 square feet are for retail use (9.1 percent). The remaining 62,000 square feet are for other uses such as community rooms and small storage areas.

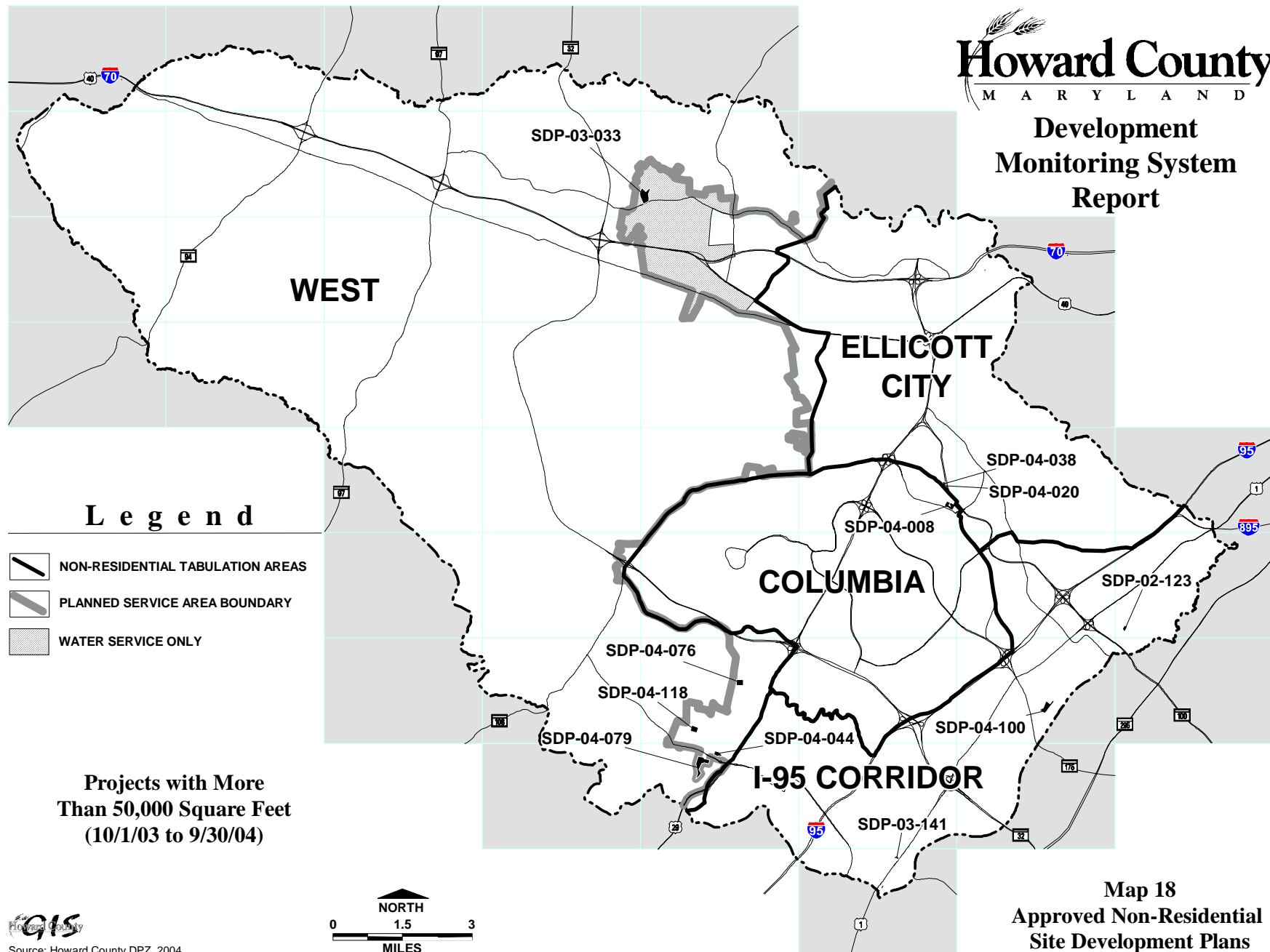
<b>Table 53</b> <b>Building Square Feet in Approved Site Development Plans, 10/01/03 to 9/30/04</b>						
<b>Region</b>	<b>Retail</b>	<b>Office/ Service</b>	<b>Manuf./ Ext. Ind.</b>	<b>Govt. &amp; Inst.</b>	<b>Other</b>	<b>TOTAL</b>
Columbia	4,885	11,970	0	117,752	11,300	145,907
Ellicott City	0	137,018	0	0	13,600	150,618
I-95 Corridor	20,458	221,283	156,649	0	15,000	413,390
West	110,785	253,699	0	396,996	21,712	783,192
<b>TOTAL</b>	<b>136,128</b>	<b>623,970</b>	<b>156,649</b>	<b>514,748</b>	<b>61,612</b>	<b>1,493,107</b>
<b>PERCENT</b>	<b>9.1%</b>	<b>41.8%</b>	<b>10.5%</b>	<b>34.5%</b>	<b>4.1%</b>	<b>100.0%</b>

## Last Year's Projects - Greater than 50,000 Square Feet

Of the 1.5 million square feet of non-residential building space approved in site development plans last year, about 926,000 square feet, 62 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 54. The location of these plans are shown on Map 18.

In Columbia, one large plan with more 50,000 square feet of building space was approved last year, an addition for Howard High School. In Ellicott City, two 53,000 square feet buildings were approved in the Columbia 100 Office Research Park near Route 100 and Executive Park Drive. Along the I-95 Corridor, three larger plans were approved totaling more than 200,000 square feet. These plans include a hotel, some manufacturing and office/warehouse space. In the West there were five larger plans approved totaling over 500,000 square feet. Two of these are for new schools, the new northern high school and the new Cedar Lane School. Two large plans in the West were for additional office space and one plan for a new church.

<b>Table 54</b> <b>Projects With More Than 50,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/03 to 9/30/04</b>					
<b>Region</b>	<b>File Number</b>	<b>Plan Name</b>	<b>Use</b>	<b>Building Area</b>	<b>TOTAL</b>
Columbia	SDP-04-008	Howard High School	School Addition	113,648	<b>113,648</b>
Ellicott City	SDP-04-020	Columbia 100 Office Research Park	Office	53,118	<b>106,236</b>
	SDP-04-038	Columbia 100 Office Research Park	Office	53,118	
I-95 Corridor	SDP-04-100	Baltimore Air Coil - Dorsey Run Ind. Center	Manufacturing	93,238	<b>204,230</b>
	SDP-03-141	Days Inn Hotel	Hotel	56,580	
	SDP-02-123	Route 100 Industrial Park	Warehouse, Office	54,412	
West	SDP-03-033	New Northern High School	School	136,752	<b>501,965</b>
	SDP-04-118	Cedar Lane at Fulton	School	103,150	
	SDP-04-044	Maple Lawn Farms	Office	93,945	
	SDP-04-076	Johns Hopkins University - APL	Office	91,476	
	SDP-04-079	Grace Community Church	Church	76,642	
<b>TOTAL</b>					<b>926,079</b>



## Five Year Results

Table 55 shows the approved non-residential site development plans for the last five years from October 1, 1999 to September 30, 2004. Over this five year period there were 385 non-residential lots approved countywide in 342 plans totaling 6,028 acres. This equates to a five year average of 1,206 approved acres per year. Over the five year period, 48 percent of the acreage was in the West, 26 percent in the I-95 Corridor, 20 percent in Columbia and 7 percent in Ellicott City.

**Table 55**  
**Approved Non-Residential Site Development Plans, 10/01/99 to 9/30/04**

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	134	35%	107	31%	1,183	20%
Ellicott City	63	16%	59	17%	396	7%
I-95 Corridor	105	27%	97	28%	1,579	26%
West	83	22%	79	23%	2,871	48%
<b>TOTAL</b>	<b>385</b>	<b>100%</b>	<b>342</b>	<b>100%</b>	<b>6,028</b>	<b>100%</b>
<b>5 YEAR AVG.</b>	<b>77</b>		<b>68</b>		<b>1,206</b>	

Table 56 shows the total non-residential acreage approved by year for each of the last five years. Last year, 181 more acres were approved compared to the previous four years – 1,602 acres last year compared to 1,421 acres for the year before.

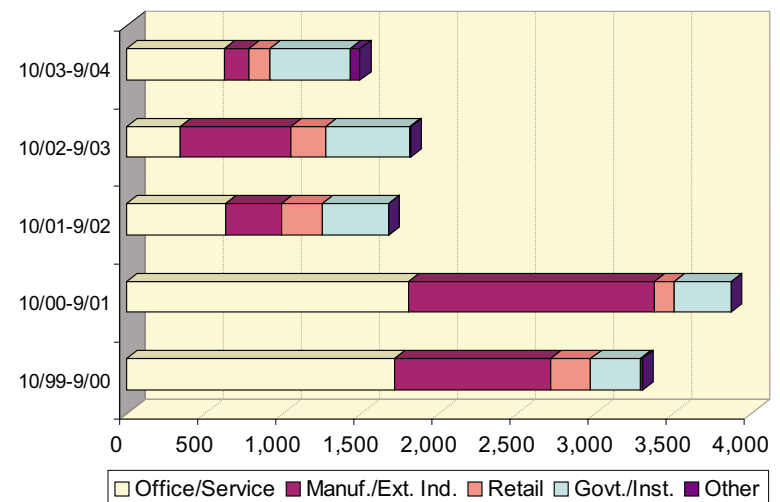
**Table 56**  
**Acreage in Approved Non-Residential Site Development Plans, 10/01/99 to 9/30/04**

Region	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	10/03-9/04	TOTAL	PERCENT
Columbia	300	320	325	162	76	1,183	20%
Ellicott City	99	73	58	144	22	396	7%
I-95 Corridor	239	453	294	126	467	1,579	26%
West	121	107	617	989	1,037	2,871	48%
<b>TOTAL</b>	<b>758</b>	<b>953</b>	<b>1,294</b>	<b>1,421</b>	<b>1,602</b>	<b>6,028</b>	<b>100%</b>

Table 57 summarizes the approved square footage by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, about 12.2 million square feet of non-residential space has been approved in the County. This is an average of about 2.4 million square feet per year.

Of this total, about 42 percent or 5.1 million square feet are for office/service space. A little over 31 percent or 3.8 million square feet are for

**Chart 22**  
**Approved Non-Residential Square Feet (x 1,000)**



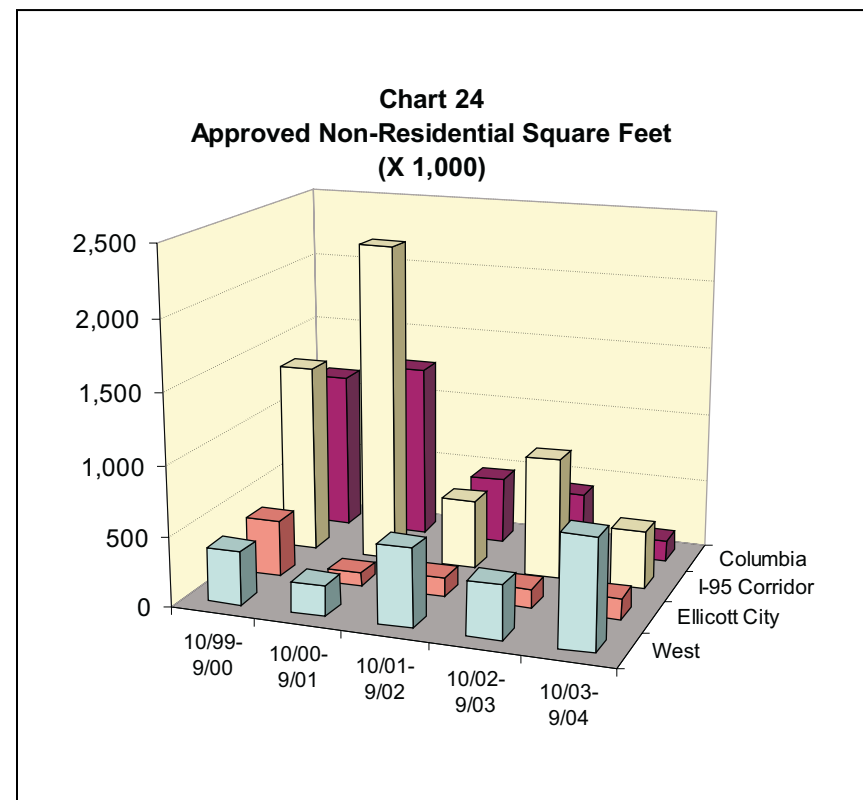
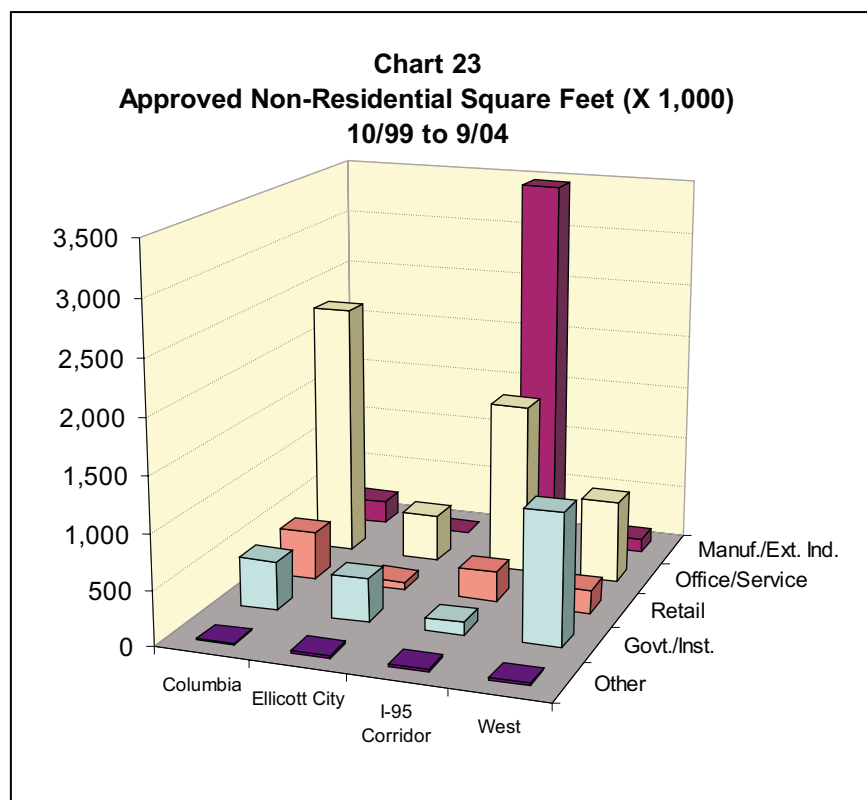
manufacturing/extensive industrial development (which includes warehouse space). Government and institutional uses account for about 18 percent of the approved building space (about 2.2 million square feet). Retail space accounts for about 8 percent of the total with about 1.0 million square feet approved. The remaining 0.7 percent (80,500 square feet) are for other uses.

Chart 22 graphically shows the countywide square footage approved by development type for each of the five years. It is clear that there has been a large reduction in approved space the last three years compared to the two years prior. The amount of approved space for each of the last three years was only about half of what it was for each of the previous two years. This reduction primarily occurred in the amount of office/service and manufacturing & extensive industrial space approved. There was actually more

government & institutional space approved each of the last two years compared to the previous years, primarily due to several new schools as well as a number of public and private school expansions.

Chart 23 shows the five year approved square footage total by development type by region. It is clear that the I-95 Corridor has had the most manufacturing/extensive industrial square footage approved. Columbia has had the most office/service and retail square footage approved over the five year period.

Chart 24 shows the total non-residential square footage approved over time for each region. Overall, Columbia and the I-95 Corridor have had the most square footage approved, followed by the West and Ellicott City. Table 57 reflects these results numerically.



**Table 57**  
**Building Square Feet in Approved Non-Residential Site Development Plans, 10/01/99 to 9/30/04**

10/99-9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	115,166	412,006	829,402	0	6,951	1,363,525
West	1,722	107,216	113,932	155,502	4,800	383,172
TOTAL	260,346	1,710,355	999,479	319,672	11,890	3,301,742
PERCENT	7.9%	51.8%	30.3%	9.7%	0.4%	100.0%
10/01-9/02						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	116,334	290,815	6,600	63,368	0	477,117
Ellicott City	29,524	6,687	0	102,746	0	138,957
I-95 Corridor	55,000	13,549	354,577	75,497	0	498,623
West	58,410	317,028	0	183,297	0	558,735
TOTAL	259,268	628,079	361,177	424,908	0	1,673,432
PERCENT	15.5%	37.5%	21.6%	25.4%	0.0%	100.0%
10/03-9/04						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	4,885	11,970	0	117,752	11,300	145,907
Ellicott City	0	137,018	0	0	13,600	150,618
I-95 Corridor	20,458	221,283	156,649	0	15,000	413,390
West	110,785	253,699	0	396,996	21,712	783,192
TOTAL	136,128	623,970	156,649	514,748	61,612	1,493,107
PERCENT	9.1%	41.8%	10.5%	34.5%	4.1%	100.0%

10/00-9/01						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	63,728	916,932	153,206	127,111	0	1,260,977
Ellicott City	14,555	20,401	0	59,030	139	94,125
I-95 Corridor	49,160	796,563	1,421,193	28,352	0	2,295,268
West	2,237	65,930	0	152,185	0	220,352
TOTAL	129,680	1,799,826	1,574,399	366,678	139	3,870,722
PERCENT	3.4%	46.5%	40.7%	9.5%	0.0%	100.0%
10/02-9/03						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	141,486	187,575	0	99,386	0	428,447
Ellicott City	2,400	10,093	0	115,747	6,889	135,129
I-95 Corridor	32,940	128,185	698,631	9,940	0	869,696
West	41,807	11,952	15,410	314,687	0	383,856
TOTAL	218,633	337,805	714,041	539,760	6,889	1,817,128
PERCENT	12.0%	18.6%	39.3%	29.7%	0.4%	100.0%
TOTAL 10/99-9/04						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	443,604	2,339,166	215,951	450,082	11,300	3,460,103
Ellicott City	72,766	433,458	0	399,228	20,767	926,219
I-95 Corridor	272,724	1,571,586	3,460,452	113,789	21,951	5,440,502
West	214,961	755,825	129,342	1,202,667	26,512	2,329,307
TOTAL	1,004,055	5,100,035	3,805,745	2,165,766	80,530	12,156,131
PERCENT	8.3%	42.0%	31.3%	17.8%	0.7%	100.0%

1. Includes plans for such things as mass grading, pathways, road improvements, substations, pump stations, communication towers, community rooms, parking lots and storm water management.



# In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2004 are tabulated and compared with those in process a year earlier (as of September 30, 2003).

## Number of Plans

Countywide, there were 63 non-residential site development plans in process as of September 30, 2004, about the same as the 65 in process one year earlier (Table 58). As of September 30, 2004, the I-95 Corridor and the West had the most plans in process with 22 each. This is followed by 15

plans in process in Columbia and 4 plans in Ellicott City.

## Number of Lots

Table 59 shows the number of potential non-residential lots in the site development plan process. Results are shown for each year and by development type. Similar to the number of plans, there were about the same number of lots in process on September 30, 2004 compared to one year earlier, 66 versus 67, respectively.

The greatest number of the non-residential lots in process for 2004 were in the I-95 Corridor with 24. The West had the next greatest activity with 22 lots. This is followed by 14 lots in process in Columbia and 6 lots in process in Ellicott City.

As of September 30, 2004, there were 17 office/service lots in the site development plan process. There were also 10 retail lots, 7 government and institutional lots, 16 manufacturing/extensive industrial lots and 16 other lots in process.

## Number of Acres

There were a total of 786 acres of non-residential land in the site development plan process as of September 30, 2004 (Table 60). This compares to

**Table 58**  
**Number of Non-Residential SDP's In Process, 09/30/03 & 09/30/04**

Region	2003	2004
Columbia	11	15
Ellicott City	11	4
I-95 Corridor	24	22
West	19	22
<b>TOTAL</b>	<b>65</b>	<b>63</b>

**Table 59**  
**Number of Lots in Site Development Plans In Process by Development Type, 09/30/03 & 09/30/04**

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other <sup>1</sup>		TOTAL	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Columbia	1	3	3	7	0	0	2	1	6	3	12	14
Ellicott City	0	0	3	1	0	0	1	2	7	3	11	6
I-95 Corridor	4	1	8	3	7	15	1	0	4	5	24	24
West	4	6	5	6	1	1	5	4	5	5	20	22
<b>TOTAL</b>	<b>9</b>	<b>10</b>	<b>19</b>	<b>17</b>	<b>8</b>	<b>16</b>	<b>9</b>	<b>7</b>	<b>22</b>	<b>16</b>	<b>67</b>	<b>66</b>

1. Includes plans for such things as mass grading, paved surfaces, athletic fields, stormwater management ponds, community bldgs/pool, storage buildings.

**Table 60**  
**Acreage of Non-Residential SDP's In Process, 09/30/03 & 09/30/04**

Region	2003	2004
Columbia	83	199
Ellicott City	44	31
I-95 Corridor	519	243
West	718	313
<b>TOTAL</b>	<b>1,364</b>	<b>786</b>

1,364 acres in process the previous year. For the current year the largest amount of the acreage is in the West with 313 acres. The I-95 Corridor had the second greatest amount of acreage in process with 243. This is followed by Columbia with 199 acres and Ellicott City with 31 acres.

## Building Floor Space

Table 61 shows the square footage of non-residential building space by building type in the site development plan process. As of September 30, 2004 there was about 2.86 million square feet of building space in the site development plan process. This is significantly more than the 1.46 million square feet in process for the previous year.

For both years most of the building space was in the I-95 Corridor. This is followed by planned space in the West, Columbia and Ellicott City, respectively.

As of September 30, 2004, there was about 1.8 million square feet of manufacturing/extensive industrial building space in the site development plan process. This is followed by about 648,000 square feet of office/service space, 266,000 square feet of government and institutional space, 93,000 square feet of retail space and 52,000 square feet of other space in process. Chart 25 reflects these results graphically and by region.

## Major Projects

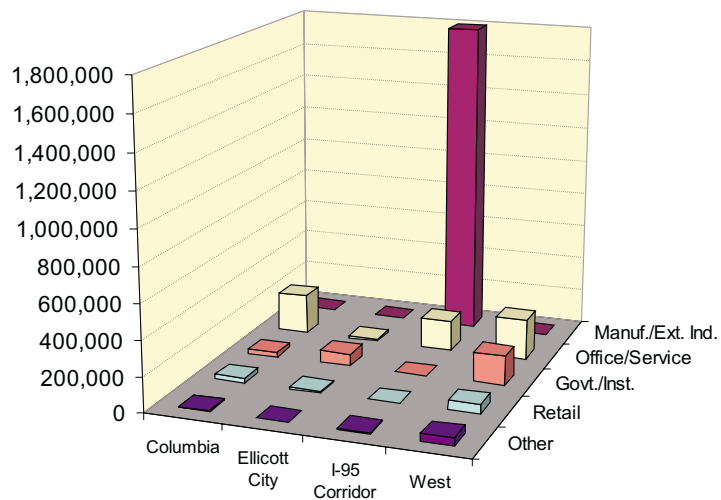
Of the total 2.86 million square feet of non-residential building space in the site development plans process as of September 30, 2004, about 2.45 million square feet, 86 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 61. The location of these plans are shown on Map 19.

In Columbia Gateway, two plans totaling 177,000 square feet of building space were in process, one for an office building and one for a fitness center. In Ellicott City, Glen Mar United Methodist is building a new 70,000 square foot church. In the I-95 Corridor, there are seven large plans in process, totaling about 1.9 million square feet, the two largest totaling more than 1 million square feet alone - Dryers Grand Ice Cream and the Dorsey Run Industrial Center, each at more than 500,000 square feet. The West has four plans over 50,000 square feet, two large office projects as part of Maple Lawn Farms as well as the new Western Elementary School and the Glenwood Community Center.

**Table 61**  
**Building Square Feet in In-Process Non-Residential Site Development Plans, 09/30/03 & 09/30/04**

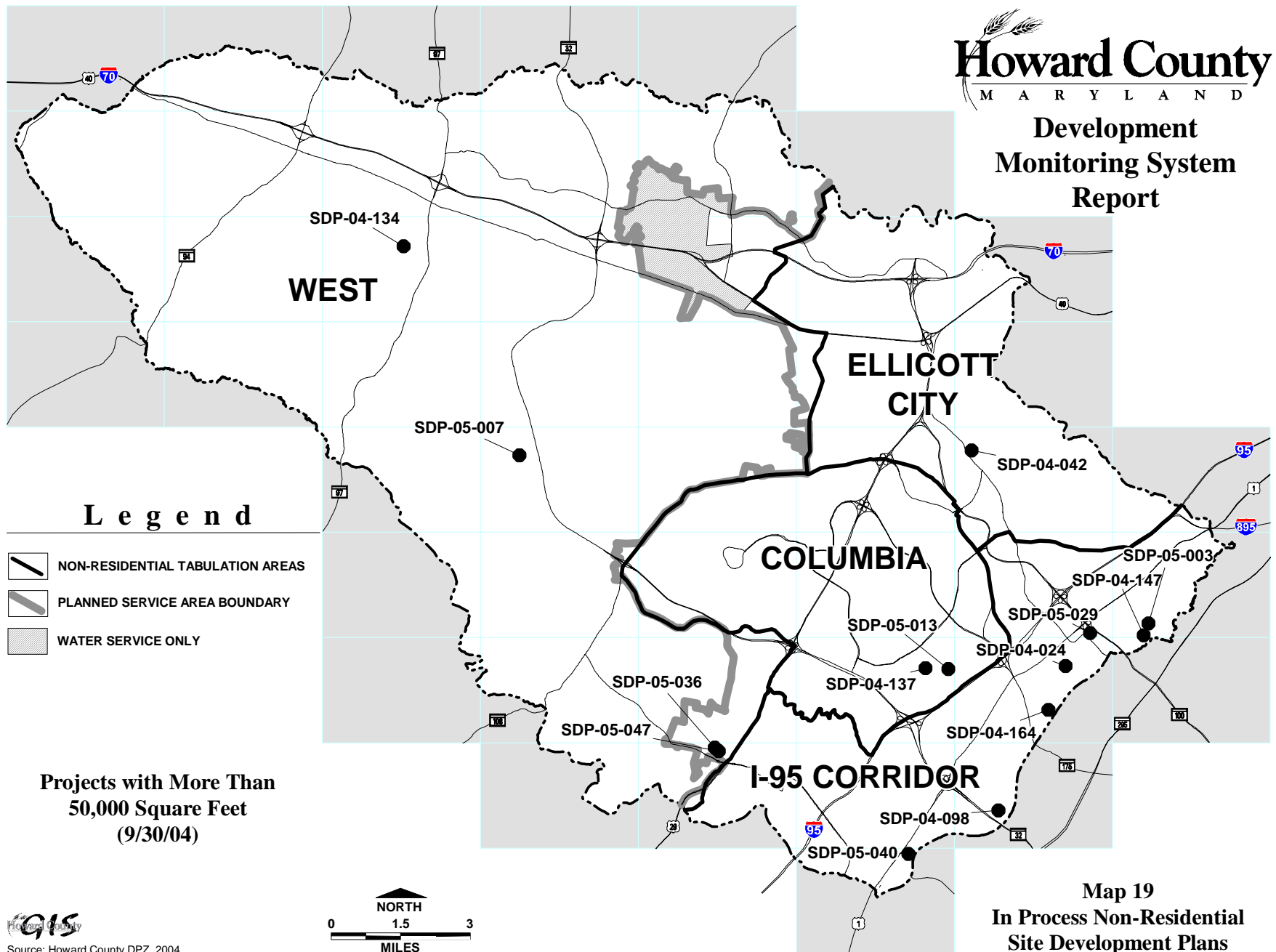
Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other		TOTAL	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2002	2004
Columbia	4,885	27,502	11,970	228,482	0	2,865	117,752	26,830	11,300	4,000	145,907	289,679
Ellicott City	15,300	9,500	87,600	9,500	0	0	18,754	70,175	13,600	0	135,254	89,175
I-95 Corridor	37,752	2,994	237,258	175,496	507,611	1,796,722	28,800	0	54,000	7,503	865,421	1,982,715
West	103,605	53,394	121,648	234,398	3,000	3,000	73,972	168,869	16,762	40,606	318,987	500,267
<b>TOTAL</b>	<b>161,542</b>	<b>93,390</b>	<b>458,476</b>	<b>647,876</b>	<b>510,611</b>	<b>1,802,587</b>	<b>239,278</b>	<b>265,874</b>	<b>95,662</b>	<b>52,109</b>	<b>1,465,569</b>	<b>2,861,836</b>

**Chart 25**  
**In-Process Non-Residential Square Feet (X 1,000)**  
**09/30/04**



**Table 62**  
**Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/04**

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-04-137	Columbia Gateway	Health Club/Fitness Center	108,890	<b>177,190</b>
	SDP-05-013	Columbia Gateway	Office - Light Manufacturing	68,300	
Ellicott City	SDP-04-042	Glen Mar United Methodist Church	Church	70,175	<b>70,175</b>
I-95 Corridor	SDP-04-164	Dorsey Run Industrial Center	Manufacturing	596,700	<b>1,860,358</b>
	SDP-05-040	Dreyer's Grand Ice Cream	Warehouse/Distribution	558,550	
	SDP-04-147	Patapsco Valley Business Center	Warehouse/Office	257,100	
	SDP-05-003	Patapsco Valley Business Center	Warehouse	228,242	
	SDP-04-098	Annapolis Junction Business Park	Office/Warehouse	109,138	
	SDP-05-029	Dorsey Business Center	Office	56,828	
	SDP-04-024	Fairfax Recycling Inc.	Warehouse	53,800	
West	SDP-05-047	Maple Lawn Farms	Office	120,340	<b>344,593</b>
	SDP-05-036	Maple Lawn Farms	Office	93,945	
	SDP-05-007	Western Elementary School and Park	School	76,347	
	SDP-04-134	Glenwood Community Center	Community Center	53,961	
<b>TOTAL</b>					<b>2,452,316</b>



# Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by region.

## Summary of Last Year's Results

Last year from October 1, 2003 to September 30, 2004, 111 non-residential building permits were issued for new construction (Table 63). The I-95 Corridor had the greatest number of issued permits with 35, 32 percent of the total. The West had 34 issued permits (31 percent). Columbia had 23

issued permits (21 percent) and Ellicott City had 19 issued permits (17 percent).

Countywide, building permits were issued for close to 1.7 million square feet of non-residential space last year. Forty-eight percent of this total, about 810,000 square feet, was for office/service space. Another 484,000 square feet were for government and institutional space (28%). Manufacturing/extensive industrial space accounted for 14 percent with 243,000 square feet. There were also permits issued for 121,000 square feet of retail space (Table 64).

By region, 582,000 square feet, 34 percent of the total, are in the I-95 Corridor. About 558,000 square feet are in the West and almost 352,000 square feet are in Columbia. The remaining 209,000 square feet are located in Ellicott City.

## Last Year's Permits - Greater Than 50,000 Square Feet

Table 65 shows the major projects of more than 50,000 square feet that were issued building permits last year. These projects amount to almost 840,000 square feet of space, about 49 percent of the 1.7 million square feet total. About 217,000 sq. ft. are in the I-95 Corridor, 331,000 in the West, 197,000 in Columbia and 108,000 in Ellicott City.

**Table 63**  
**Issued Non-Residential Building Permits, 10/01/03 to 9/30/04**

Region	Number	Percent
Columbia	23	21%
Ellicott City	19	17%
I-95 Corridor	35	32%
West	34	31%
<b>TOTAL</b>	<b>111</b>	<b>100%</b>

**Table 64**  
**Square Feet of Issued Non-Residential Building Permits by Type, 10/01/03 to 9/30/04**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL	PERCENT
Columbia	7,537	251,990	0	82,800	9,465	351,792	21%
Ellicott City	3,103	138,255	0	51,858	16,389	209,605	12%
I-95 Corridor	47,447	344,883	183,785	2,606	2,819	581,540	34%
West	62,463	75,090	58,770	346,641	15,392	558,356	33%
<b>TOTAL</b>	<b>120,550</b>	<b>810,218</b>	<b>242,555</b>	<b>483,905</b>	<b>44,065</b>	<b>1,701,293</b>	<b>100%</b>
<b>PERCENT</b>	<b>7%</b>	<b>48%</b>	<b>14%</b>	<b>28%</b>	<b>3%</b>	<b>100%</b>	

1. Includes community centers, recreation facilities, parking areas and other such building types

**Table 65**  
**Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/03 to 9/30/04**

Region	Subdivision/Name	Proposed Use	Square Feet	TOTAL
I-95 Corridor	The Horse Farm	Office Building	85,620	<b>217,009</b>
	Baltimore Washington Auto Exchange	Office/Warehouse Building	65,976	
	Meadowridge Business Park	Office/Warehouse Building	65,413	
Columbia	Columbia Gateway	Office Building	100,270	<b>182,270</b>
	Howard Community College	New Art Center	82,000	
Ellicott City	Columbia 100 Office	Office Building	54,318	<b>108,013</b>
	Howard County Executive Center	Office Building	53,695	
West	Northern High School	New School	136,752	<b>331,019</b>
	Lime Kiln Middle	School Addition	91,662	
	Johns Hopkins APL	New Building	52,605	
	St. Louis Catholic Church	Church Addition	50,000	
<b>TOTAL</b>				<b>838,311</b>

The largest permit was for the 137,000 square foot new Northern High School, newly named Marriotts Ridge. The largest office building at more than 100,000 square feet was in Columbia Gateway. In the West, another large government project, the new addition for Lime Kiln Middle, totals almost 92,000 square feet. Map 20 shows the locations of these larger projects.

## Five Year Results

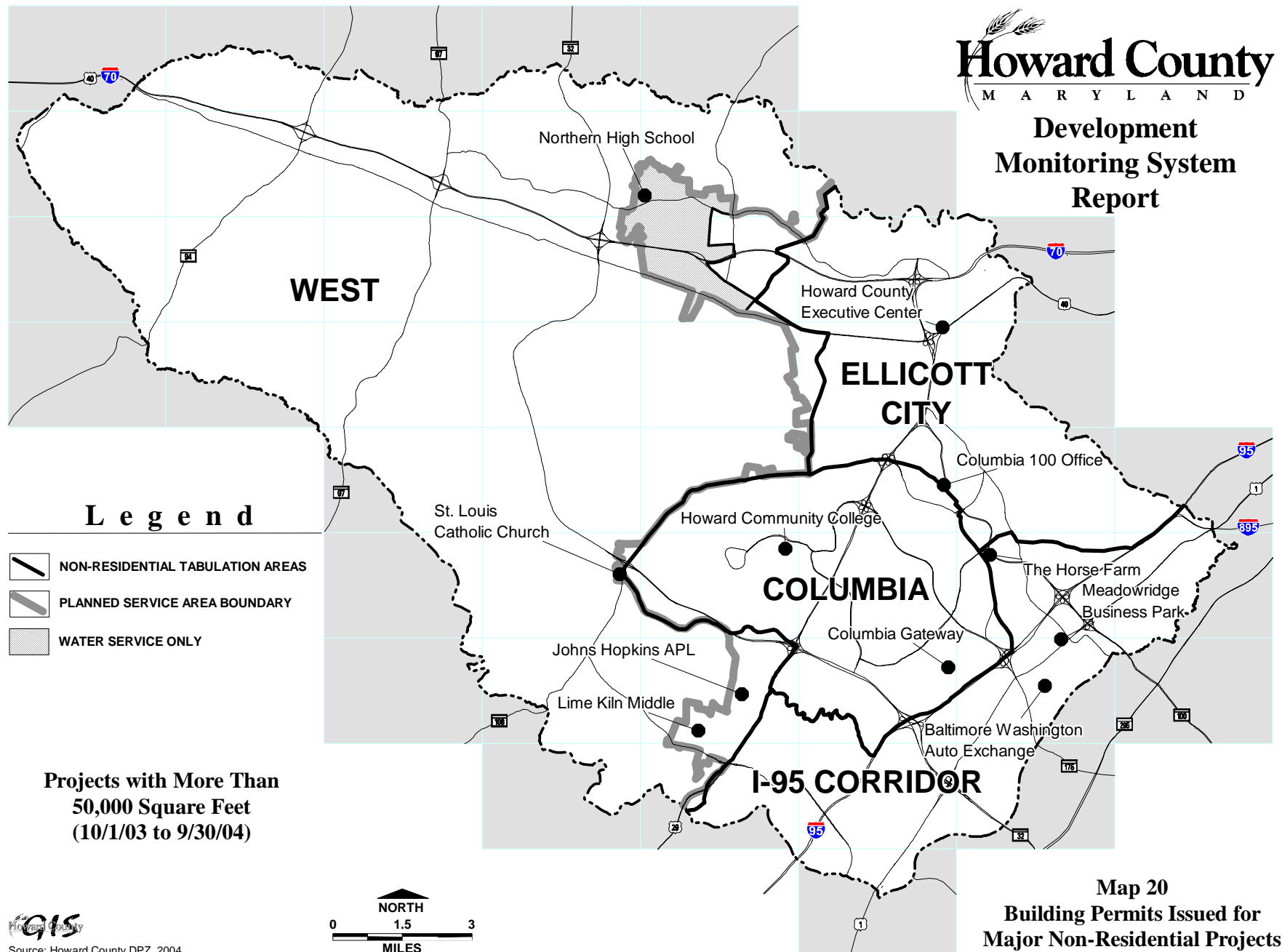
Over the last five years from October 1, 1999 to September 30, 2004, 650 non-residential building permits were issued for new construction (Table 66). This is an average of about 130 permits per year. Over the five year

period Columbia had the greatest number of issued permits with 206, about 32 percent of the total. The I-95 Corridor had 173 issued permits (27 percent). The West and Ellicott City had 156 and 115 issued permits, about 24 and 18 percent of the total each, respectively.

Table 67 summarizes the square footage in issued building permits by development type for each of the last five years. The five year total is also shown in the bottom right hand corner of the table. For the five year period, building permits for almost 11.5 million square feet of non-residential space have been issued in the County. This is an average of about 2.3 million square feet per year.

**Table 66**  
**Issued Non-Residential Building Permits, 10/01/99 to 9/30/04**

Region	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	10/03-9/04	TOTAL	PERCENT
Columbia	81	49	30	23	23	<b>206</b>	<b>32%</b>
Ellicott City	32	20	22	22	19	<b>115</b>	<b>18%</b>
I-95 Corridor	33	45	27	33	35	<b>173</b>	<b>27%</b>
West	35	31	23	33	34	<b>156</b>	<b>24%</b>
<b>TOTAL</b>	<b>181</b>	<b>145</b>	<b>102</b>	<b>111</b>	<b>111</b>	<b>650</b>	<b>100%</b>





Of this total, about 42 percent or 4.85 million square feet are for office/service space. About 29 percent or 3.37 million square feet are for manufacturing/extensive industrial space. Government and institutional uses account for about 15.7 percent of the total with about 1.8 million square feet. Retail uses account for 10.9 percent of the total (1.26 million square feet). The remaining 2.2 percent (252,436 square feet) are for other uses.

Chart 26 graphically shows the countywide square footage by development type for each of the last five years. Last year's total of about 1.7 million square feet was slightly more than the year before which had 1.6 million square feet. It was not quite as great as the year before that which had 1.8 million square feet. These three years are significantly less than the two years before that which had over 3 million square feet each.

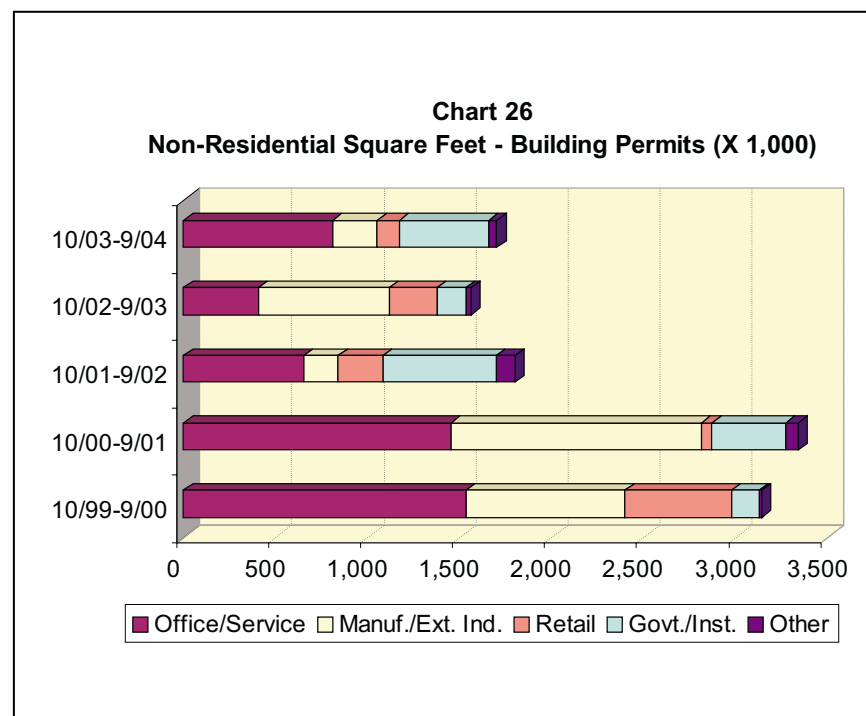
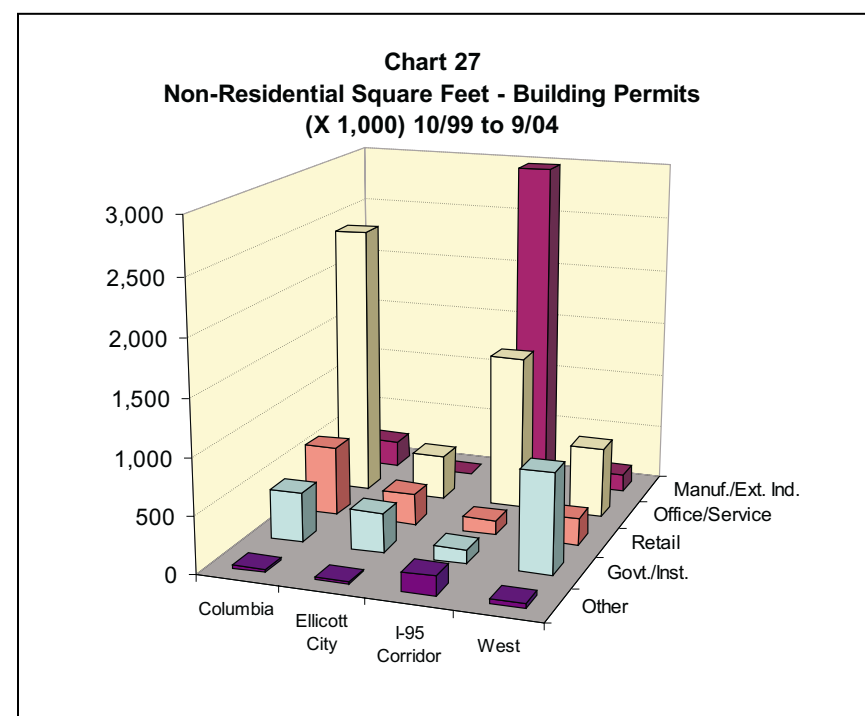


Chart 27 shows the five year square footage total by development type by region. It is apparent that most of the development over the last five years is for manufacturing/extensive industrial and office/service uses. Furthermore, it is clear that most of the manufacturing/extensive industrial development is in the I-95 Corridor and most of the office/service development is in the Columbia region. Columbia also has the most retail development, followed by Ellicott City and the West.

Chart 28 shows the total non-residential square footage in issued building permits over time for each region. For most years, Columbia and the I-95 Corridor had the most development, followed by the West and Ellicott City. The steady decline of development in Columbia is also apparent. This is primarily a result of declining development in the Gateway Industrial Park as it approaches buildout.



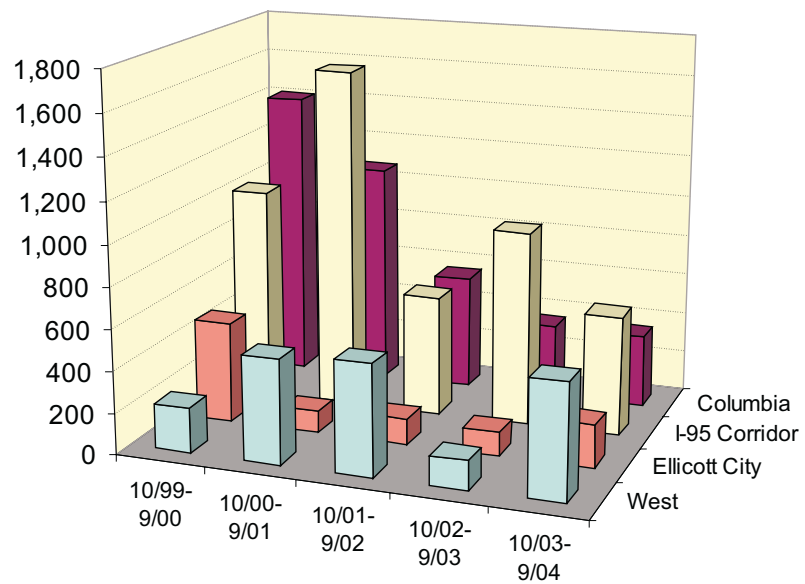


**Table 67**  
**Square Feet of Issued Non-Residential Building Permits by Type, 10/01/99 to 9/30/04**

10/99 to 9/00							10/00 to 9/01					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	189,341	1,099,040	82,805	28,579	7,276	1,407,041	41,517	780,955	142,504	111,374	0	1,076,350
Ellicott City	207,918	164,672	0	116,731	613	489,934	6,477	64,269	0	34,408	0	105,154
I-95 Corridor	56,090	183,021	779,952	4,340	1,280	1,024,683	5,120	454,641	1,116,151	8,690	67,898	1,652,500
West	125,007	90,146	0	0	3,864	219,017	5,060	151,677	102,539	245,439	0	504,715
<b>TOTAL</b>	<b>578,356</b>	<b>1,536,879</b>	<b>862,757</b>	<b>149,650</b>	<b>13,033</b>	<b>3,140,675</b>	<b>58,174</b>	<b>1,451,542</b>	<b>1,361,194</b>	<b>399,911</b>	<b>67,898</b>	<b>3,338,719</b>
<b>PERCENT</b>	<b>18.4%</b>	<b>48.9%</b>	<b>27.5%</b>	<b>4.8%</b>	<b>0.4%</b>	<b>100.0%</b>	<b>1.7%</b>	<b>43.5%</b>	<b>40.8%</b>	<b>12.0%</b>	<b>2.0%</b>	<b>100.0%</b>
10/01 to 9/02							10/02 to 9/03					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	161,691	175,090	6,600	208,907	5,412	557,700	218,368	124,803	0	14,142	160	357,473
Ellicott City	24,088	22,699	0	78,323	0	125,110	35,386	10,303	0	71,195	1,105	117,989
I-95 Corridor	13,093	191,726	181,257	100,169	94,990	581,235	2,986	213,322	714,670	9,940	4,078	944,996
West	43,809	262,229	0	229,036	0	535,074	0	55,505	0	63,527	21,695	140,727
<b>TOTAL</b>	<b>242,681</b>	<b>651,744</b>	<b>187,857</b>	<b>616,435</b>	<b>100,402</b>	<b>1,799,119</b>	<b>256,740</b>	<b>403,933</b>	<b>714,670</b>	<b>158,804</b>	<b>27,038</b>	<b>1,561,185</b>
<b>PERCENT</b>	<b>13.5%</b>	<b>36.2%</b>	<b>10.4%</b>	<b>34.3%</b>	<b>5.6%</b>	<b>100.0%</b>	<b>16.4%</b>	<b>25.9%</b>	<b>45.8%</b>	<b>10.2%</b>	<b>1.7%</b>	<b>100.0%</b>
10/03 to 9/04							TOTAL 10/99 to 9/04					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	7,537	251,990	0	82,800	9,465	351,792	618,454	2,431,878	231,909	445,802	22,313	3,750,356
Ellicott City	3,103	138,255	0	51,858	16,389	209,605	276,972	400,198	0	352,515	18,107	1,047,792
I-95 Corridor	47,447	344,883	183,785	2,606	2,819	581,540	124,736	1,387,593	2,975,815	125,745	171,065	4,784,954
West	62,463	75,090	58,770	346,641	15,392	558,356	236,339	634,647	161,309	884,643	40,951	1,957,889
<b>TOTAL</b>	<b>120,550</b>	<b>810,218</b>	<b>242,555</b>	<b>483,905</b>	<b>44,065</b>	<b>1,701,293</b>	<b>1,256,501</b>	<b>4,854,316</b>	<b>3,369,033</b>	<b>1,808,705</b>	<b>252,436</b>	<b>11,540,991</b>
<b>PERCENT</b>	<b>7.1%</b>	<b>47.6%</b>	<b>14.3%</b>	<b>28.4%</b>	<b>2.6%</b>	<b>100.0%</b>	<b>10.9%</b>	<b>42.1%</b>	<b>29.2%</b>	<b>15.7%</b>	<b>2.2%</b>	<b>100.0%</b>

1. Includes community centers, pavillions, pump houses, guard shack, storage sheds, utility bldgs, storage space and other such building types.

**Chart 28**  
**Non-Residential Square Feet - Building Permits**  
**(X 1,000)**



## Employment Estimates

To estimate employment several steps were taken. First, employment estimates as indicated on site development plans were used. If this was not available, then employment was estimated based on the standard square feet per employee factors shown in Table 68. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits. In some cases, particularly for government and institutional uses and schools and religious facilities, owners or representatives of the property were contacted to determine potential employment.

**Table 68**  
**Square Feet per Employee Standard Factors**

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	250

The first section below estimates employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

### Estimated Employment from Site Development Plans

#### *Last Year's Results*

Space in site development plans approved last year from October 1, 2003 to September 30, 2004 could accommodate an estimated 2,418 employees (Table 69). About 59 percent of the potential jobs are located in the West, where they are mostly office/service jobs. About 23 percent of the poten-

**Table 69**  
**Potential Employment from Approved Non-Residential SDP's**  
**By Use Category, 10/01/03 to 9/30/04**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	12	29	0	0	25	67	3%
Ellicott City	0	548	0	0	0	548	23%
I-95 Corridor	51	179	157	0	0	387	16%
West	270	997	0	0	149	1,416	59%
<b>TOTAL</b>	<b>334</b>	<b>1,754</b>	<b>157</b>	<b>0</b>	<b>174</b>	<b>2,418</b>	<b>100%</b>
<b>PERCENT</b>	<b>14%</b>	<b>73%</b>	<b>6%</b>	<b>0%</b>	<b>7%</b>	<b>100%</b>	

tial jobs are in Ellicott City, all office/service jobs. About 16 percent of the jobs are in the I-95 Corridor and 3 percent are in Columbia.

Countywide, 1,754 potential jobs, or about 73 percent of the total, are of office/service jobs. This is followed by 14 percent retail jobs, 6 percent manufacturing/extensive industrial jobs and 7 percent for schools and religious facilities jobs.

#### *Five Year Results*

Tables 70 and 71 show the potential employment from approved site development plans over the last five years, from October 1, 1999 to September 30, 2004. Over the five year period, the total comes to 25,618 new jobs, an

**Table 70**  
**Potential Employment from Approved Non-Residential SDP's**  
**By Use Category, 10/01/99 to 9/30/04**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	1,125	8,643	160	126	113	10,167	40%
Ellicott City	170	1,778	0	326	112	2,386	9%
I-95 Corridor	410	5,048	3,213	15	128	8,813	34%
West	530	3,041	5	88	588	4,252	17%
<b>TOTAL</b>	<b>2,235</b>	<b>18,510</b>	<b>3,378</b>	<b>555</b>	<b>941</b>	<b>25,618</b>	<b>100%</b>
<b>PERCENT</b>	<b>9%</b>	<b>72%</b>	<b>13%</b>	<b>2%</b>	<b>4%</b>	<b>100%</b>	

**Table 71**  
**Potential Employment from Approved Non-Residential Site Development Plans**

Region	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	10/02 to 9/03	10/03 to 9/04	TOTAL	PERCENT
Columbia	3,961	3,993	1,032	1,114	67	10,167	40%
Ellicott City	1,477	132	112	117	548	2,386	9%
I-95 Corridor	2,359	4,615	516	936	387	8,813	34%
West	654	332	1,488	361	1,416	4,252	17%
<b>TOTAL</b>	<b>8,451</b>	<b>9,072</b>	<b>3,148</b>	<b>2,528</b>	<b>2,418</b>	<b>25,618</b>	<b>100%</b>
<b>PERCENT</b>	<b>33%</b>	<b>35%</b>	<b>12%</b>	<b>10%</b>	<b>9%</b>	<b>100%</b>	

average of 5,124 jobs per year. Table 71 shows that in 1999 and 2000 a lot of potential jobs were created at about 9,000. In 2001 the number dropped substantially to about 3,000 and for the last two years about 2,500 jobs had the potential to be created based on approved space in site development plans.

Over the five year period, the greatest percentage of the jobs are located in Columbia with 40 percent of the total. The I-95 Corridor has 34 percent of the total, followed by 17 percent in the West and 9 percent in Ellicott City. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for government and institutional and schools and religious facilities comprise only 6 percent of the total.

## Estimated Employment from Building Permits

### *Last Year's Results*

An estimated 3,977 new jobs are projected based on issued building permits last year from October 1, 2003 to September 30, 2004 (Table 72). About 42 percent of the potential jobs, mostly office/service and manufacturing/extensive industrial jobs, are located in the I-95 Corridor. About 26 percent of the jobs are in Columbia. The remaining 17 percent of the jobs are in the West and 14 percent are in Ellicott City.

Countywide, 3,241 potential jobs, or about 81 percent of the total, are office/service jobs. This is followed by 8 percent for retail jobs.

**Table 72**  
**Potential Employment from Issued Non-Residential Building Permits**  
**By Use Category, 10/01/03 to 9/30/04**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	19	1,008	0	0	9	1,036	26%
Ellicott City	8	553	0	0	10	571	14%
I-95 Corridor	119	1,380	184	0	0	1,682	42%
West	156	300	59	0	173	688	17%
<b>TOTAL</b>	<b>301</b>	<b>3,241</b>	<b>243</b>	<b>0</b>	<b>192</b>	<b>3,977</b>	<b>100%</b>
<b>PERCENT</b>	<b>8%</b>	<b>81%</b>	<b>6%</b>	<b>0%</b>	<b>5%</b>	<b>100%</b>	

Manufacturing/extensive industrial jobs make up 6 percent of the total. The remaining 5 percent are schools and religious facilities jobs.

### *Five Year Results*

Tables 73 and 74 show the potential employment from issued building permits over the last five years, from October 1, 1999 to September 30, 2004. Over the five year period, the estimate results in 25,260 new jobs, an average of about 5,051 jobs per year.

As expected, the greatest percentage of the jobs are located in Columbia with about 42 percent of the total. The I-95 Corridor has about 34 percent of the total, followed by 15 percent in the West and 9 percent in Ellicott City. Most of the new jobs are office/service jobs followed by manufactur-

**Table 73**  
**Potential Employment from Issued Non-Residential Building Permits**

Region	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	10/02 to 9/03	10/02 to 9/03	TOTAL	PERCENT
Columbia	4,436	3,444	681	1,049	1,036	10,646	42%
Ellicott City	981	296	161	174	571	2,183	9%
I-95 Corridor	1,348	2,954	1,058	1,590	1,682	8,632	34%
West	664	949	1,244	253	688	3,799	15%
<b>TOTAL</b>	<b>7,429</b>	<b>7,643</b>	<b>3,144</b>	<b>3,066</b>	<b>3,977</b>	<b>25,260</b>	<b>100%</b>
<b>PERCENT</b>	<b>29%</b>	<b>30%</b>	<b>12%</b>	<b>12%</b>	<b>16%</b>	<b>100%</b>	

**Table 74**  
**Potential Employment from Issued Non-Residential Building Permits**  
**By Use Category, 10/01/99 to 9/30/04**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	1,406	8,913	198	45	85	10,646	42%
Ellicott City	581	1,427	0	38	137	2,183	9%
I-95 Corridor	239	5,400	2,895	15	83	8,632	34%
West	649	2,471	161	68	449	3,799	15%
<b>TOTAL</b>	<b>2,874</b>	<b>18,211</b>	<b>3,254</b>	<b>167</b>	<b>754</b>	<b>25,260</b>	<b>100%</b>
<b>PERCENT</b>	<b>11%</b>	<b>72%</b>	<b>13%</b>	<b>1%</b>	<b>3%</b>	<b>100%</b>	

ing/extensive industrial jobs and then retail jobs. Jobs for the government and institutional and school and religious facilities categories comprise only about 4 percent of the total.

## State of Maryland Employment Estimates

The previous sections estimate *potential* employment from new development. This section provides an overview of estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR). This would include a potential increase in employment from new development as well as any change in the number of jobs in existing building space. The latter would generally be impacted by changes in vacancy rates associated with the economy. It could also be a result of the re-configuration of existing building space resulting in more (or less) jobs

per square foot. An example of this is the re-configuration of a warehouse to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance (UI) Law of Maryland and the unemployment compensation for federal employees (UCFE) program. Together these two account for approximately 98 percent of all wage and salary civilian employment. Since wage and salary employment represents approximately 93 percent of total civilian employment, DLLR estimates that their data reflects over 91 percent of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 20 percent of Howard County's employment in 2002 was not reported by the State.

Table 75 shows both DLLR and BEA employment data and the annual increase from 1999 to 2004. BEA data generally has a two year lag time resulting in no available data for 2003 and 2004. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of about 3,700 jobs per year for the last five years. Last year, from 2003 to 2004, the State reports an increase of 3,262 jobs, a reversal of the previous year's slight job loss.

Table 76 shows the jobs and average wages by job type as reported by the State for the first quarter of 2003 and 2004. In the first quarter of 2004, the State reported that there were 136,493 jobs in Howard County with an average weekly wage of \$847. This compares to 133,231 jobs one year

earlier with an average wage of \$819. This is net increase of 3,262 jobs and about a 3.42 percent increase in average wages.

**Table 75**  
**Jobs in Howard County**

Year	DLLR <sup>1</sup>		BEA <sup>2</sup>	
	Jobs	Increase	Jobs	Increase
1999	117,775		155,485	
2000	124,843	7,068	161,085	5,600
2001	130,717	5,874	166,519	5,434
2002	133,338	2,621	169,073	2,554
2003	133,231	(107)	NA	NA
2004	136,493	3,262	NA	NA
<b>Average</b>		<b>3,744</b>		

1. Maryland State Department of Labor, Licensing and Regulation

(1st quarter employment)

2. U.S. Bureau of Economic Analysis (annual employment)

**Table 76**  
**Jobs and Wages by Industry, 2002 and 2003<sup>1</sup>**

Job Type	2003		2004	
	Jobs	Avg. Wage	Jobs	Avg. Wage
<b>Government Sector</b>				
Federal Government	682	\$1,089	652	\$1,146
State Government	3,892	\$694	3,875	\$656
Local Government	11,649	\$730	11,948	\$759
<b>Subtotal/Average</b>	<b>16,223</b>	<b>\$736</b>	<b>16,475</b>	<b>\$750</b>
<b>Goods Producing</b>				
Natural Resources and Mining	264	\$417	224	\$505
Construction	10,985	\$957	10,913	\$971
Manufacturing	6,492	\$995	6,509	\$1,003
<b>Subtotal/Average</b>	<b>17,741</b>	<b>\$963</b>	<b>17,646</b>	<b>\$977</b>
<b>Service Providing</b>				
Trade, Transportation, and Utilities	35,806	\$734	36,534	\$744
Information	1,886	\$1,118	1,850	\$1,110
Financial Activities	8,596	\$1,419	8,781	\$1,425
Professional and Business Services	25,895	\$1,041	27,105	\$1,114
Education and Health Services	12,250	\$619	12,600	\$687
Leisure and Hospitality	11,116	\$271	11,645	\$285
Other Services	3,636	\$516	3,790	\$540
<b>Subtotal/Average</b>	<b>99,185</b>	<b>\$807</b>	<b>102,304</b>	<b>\$840</b>
<b>Unclassified</b>	<b>83</b>	<b>\$646</b>	<b>68</b>	<b>\$484</b>
<b>TOTAL</b>	<b>133,231</b>	<b>\$819</b>	<b>136,493</b>	<b>\$847</b>

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

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